City Performance Management
2023 Q1 SB Stat Post-Meeting Memo

This memo shares project status updates on projects in the Mayor's strategic project portfolio and lists next steps identified at the SB Stat meeting. This memo is shared with all SB Stat meeting attendees so it is clear who is responsible for next steps on a project for the Mayor.

Customer Service Stat Project Portfolio

Project	Project Lead	Projected Completion	Status
Post call surveys Improve frontline customer service interactions	Becky Phung (Transition to David Yang)	Ongoing	🟢
Service request dashboard Give departments and public line of sight into SLAs and how often they are met	David Finley	May 2023	🟢
Utility data report Review utility data in monthly report	Max Welch	Ongoing	🟢
Customer service culture Identify opportunities to develop a culture of customer service among City staff	Becky Phung	April 2023	🟢
City Hall One Stop Shop Plan for One Stop Shop for Customer Service at new City Hall	David Yang	July 2023	🟢

Legend   🟢 Project on schedule   🔴 Project delayed   🔴 Project cancelled

Commented [BP1]: @David Finley Could you review this memo by EOW-ish, and update things as needed? Thank you!

Commented [DF2R1]: Done

Commented [BP3]: @David Yang Is there a projected completion date for the One Stop Shop project?

Commented [DY4R3]: @Denise Riedl . I believe we would want a plan for public works and the architectural firm by end of Q2

Commented [DF5R3]: changing this to July 2023

Post call surveys

Action item	Owner	Proposed deadline
Goal: Increase callers who opt into the survey		
Update prepend prompts to include language that by opting into the survey, residents will not lose their place in the call	Becky Phung	Fri, 4/28/23
Test if survey for each line is still working	Becky Phung	Fri, 4/28/23
Send refresher on conducting survey to call takers for each line	Becky Phung	Fri, 4/7/23
Goal: Improve satisfaction ratings (Question 1-4)		
Conduct analyses on different call metrics that could affect satisfaction with timeliness	Becky Phung	Fri, 5/26/23
Conduct low rating analysis (for "1" responses)	Becky Phung	Fri, 5/26/23
Goal: Improve Equity & Access to City services		
Develop different models for measuring equity & access using service request data	Becky Phung	Fri, 5/26/23
Conduct repeat call analysis from Cisco call data (ex: add potential metric for percentage of unique calls who opt into survey)	Becky Phung	Fri, 5/26/23

Utility data report

Action item	Owner	Proposed deadline
Goal: Improve KPIs outlined in utility data report		
Outline high level insights in each monthly report email	Max Welch	Monthly
Develop personas for households in UAP still behind on utility bill	Max Welch	Fri, 5/26/23
Research requirements for enabling text reminders	Max Welch	Fri, 4/28/23

Commented [BP6]: I assigned these action items myself, but let me know if you'd like to switch anything around

Commented [DF7R6]: made some edits to these that removed contractions, made more formal

Commented [BP8]: Messaged Herschel asking for help with checking each line

Commented [BP9R8]: Herschel confirmed by calling each line that responses were going through by checking data in CUIC

Commented [BP10R8]: Herschel following up with Aunalytics to double check no technical issues

Commented [BP11R8]: Note: When Herschel called the line, person who picked up at Morris thought the survey was over. Person who picked up at Utilities didn't know how to transfer call.

Commented [BP12R8]: Jon from aunalytics confirmed no technical issues too.

Commented [BP13]: Sent with notes to 311, Utilities, and Morris lines

Commented [BP14R13]: Shawn McCubbin will forward notes to Utilities team. Aaron Perri requested training.

Commented [BP15]: I definitely want to do this one though!

Customer service culture

Action item	Owner	Proposed deadline
Goal: Improve internal culture of customer service		
Develop customer service category for quarterly Mayor's recognition award; consider categories for other City values too	Kacey Gergely	Fri, 4/28/23
Connect utilities team with customer service training; connect with 311 team	Jitin Kain	Fri, 4/28/23