

SBStat | Customer Service

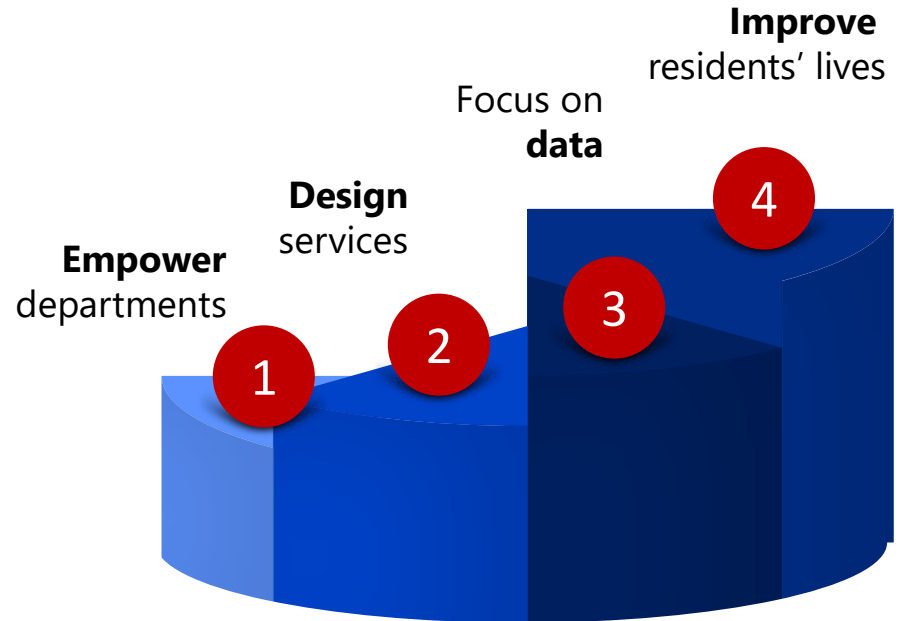
2023 Quarter 1 | Monday, April 3, 2023
City of South Bend



Why we're here

Citywide Performance Management

The purpose of SB Stat is to bring the most powerful people in the City – the Mayor, Department Heads, and key staff – into a room to **use data and take action** on some of the City's most pressing challenges



Stat meeting structure & cadence

- The Mayor's Office sets the agenda for the meeting
- The Business Analytics team schedules the meeting each quarter and invites attendees
- The Business Analytics team documents all action items discussed during the meeting and assigns each item to the appropriate City team

Participants

Project Leads, analysts, and other key staff

Mayor & Department Heads

Purpose in the Stat meeting

- Lead discussion on assigned projects
- Contribute with ideas, knowledge on data sources, and suggestions for improving performance
- Share ideas, ask questions and contribute to discussion on strategy and performance targets,
- Assign next steps to relevant members of their department/teams

Customer Service Portfolio Summary

Project	Project Objectives	Status
Post-call surveys	Improve frontline customer service interactions	●
Service request dashboard	Give departments and public line of sight into SLAs and how often they are met	●
Utility data report	Review utility data in monthly report	●
Customer service culture	Identify opportunities to develop a culture of customer service among City staff	●
City hall One Stop Shop	Plan for One Stop Shop for Customer Service at new City Hall	●

Legend



Project on schedule



Project delayed



Project cancelled

Today's Agenda



I. Data summary + action plan on quarterly KPIs

II. Deep-dive on select projects and challenges

- Utility data report
- Customer service culture

III. Celebrating our values

Data summary + action plan on quarterly KPIs

Summarizing data points and statistics from the past quarter related to core operations

Customer Service KPI Summary

Customer Service KPIs	Type of performance measure	How we measure success	Desired outcome	How the metric aligns with the City's values
Customer Satisfaction	Effectiveness	<ul style="list-style-type: none"> Post call survey average ratings at least 4.5 for all categories 	Residents receive excellent customer service over the phone	Excellence
Timeliness (Resolution)	Effectiveness	<ul style="list-style-type: none"> "Yes" responses to Q5 Resolution is at least 80% 	Residents resolve their issue OR Residents get questions answered in one phone call	Innovation
Timeliness (Communication)	Efficiency	<ul style="list-style-type: none"> "Yes" responses to Q6 First-time call Yes is at least 80% 	Residents don't have to call multiple times for the same issue	Accountability
Equity & Access	Effectiveness	<ul style="list-style-type: none"> Percent of service requests complete on time by census tract and income 	Residents receive the same quality and number of services regardless of location or other demographics	Inclusion
Culture of Customer Service	Effectiveness	<ul style="list-style-type: none"> At least 1 Mayor's Employee Recognition award recognizes good customer service by quarter (TBD) 	City employees provide excellent customer service in all interactions with residents	Empowerment

Customer Service KPIs

Q4 2022 to Q1 2023

Customer Service KPIs	KPI	Q4 2022	Q1 2023	Percent Change
Customer Satisfaction	Average - All post call survey questions	4.6	4.4	↓ 4.3%
Timeliness (Resolution)	Percent answered "Yes" to Q5 Resolution	90%	90%	— 0%
Timeliness (Communication)	Percent answered "Yes" Q6 First-time call	69%	82%	↑ 19%
Culture of Customer Service	Count of Mayor's Employee Recognition award recognizing good customer service	n/a	n/a	n/a

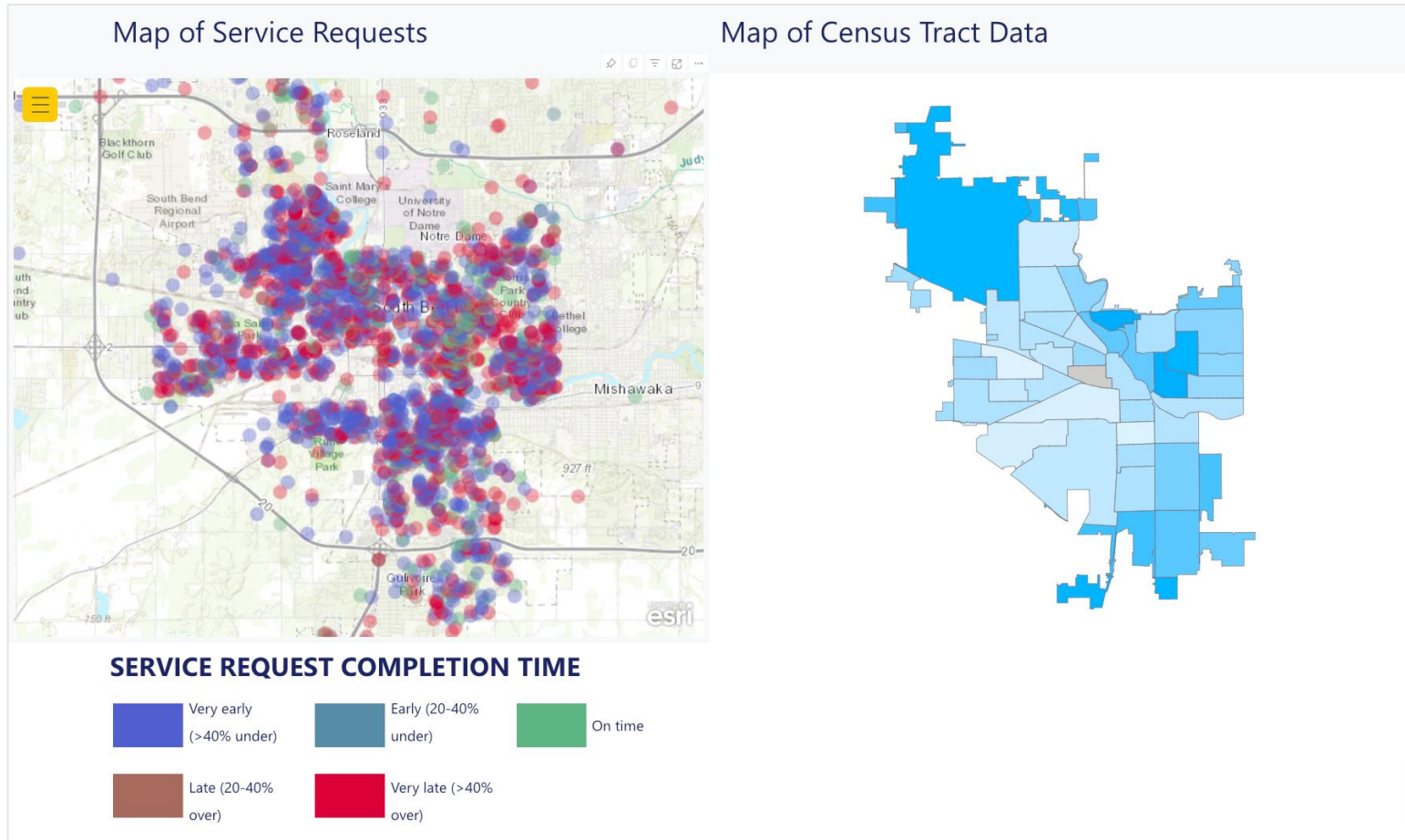
Customer Service KPIs – Equity & Access (draft)

Q4 2022 to Q1 2023

Income tiers from census tract data	Average number of service requests – Q4 2022	Average number of service requests – Q1 2023	Percent change
Low - \$0 to \$46,000 annual household income (XX% of population)	#	#	#%
Mid - \$XX to \$XX annual household income (XX% of population)	#	#	#%
High - \$XX to \$XX annual household income (XX% of population)	#	#	#%
Total	#	#	#%

Customer Service KPIs – Service request dashboard (draft)

Q1 2023

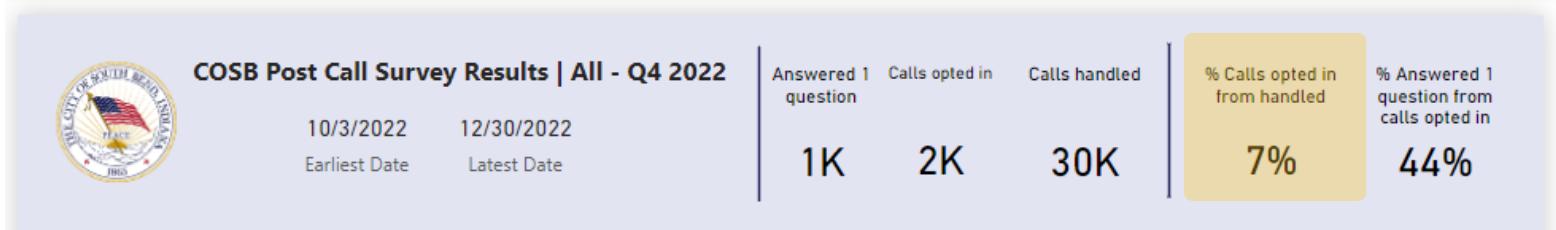


Median Income that ranges from \$141,948 - \$23,188 (dark blue to light blue)

KPI Review

% Calls opted into survey from calls handled decreased by 99% from Q4 2022 to Q1 2023

Q4 2022



Q1 2023



Possible explanations

- Technical issues with survey applications
- Not asking caller at end of call if they want to take the survey
- Not ending call in Jabber before ending in Cisco Finesse

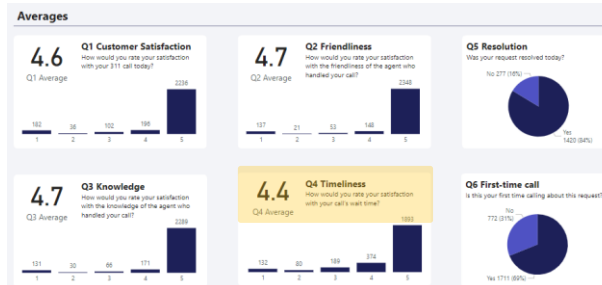
KPI Review

Lowest average rating for all lines (all-time) is Q4 Timeliness - How would you rate your satisfaction with your call's wait time?

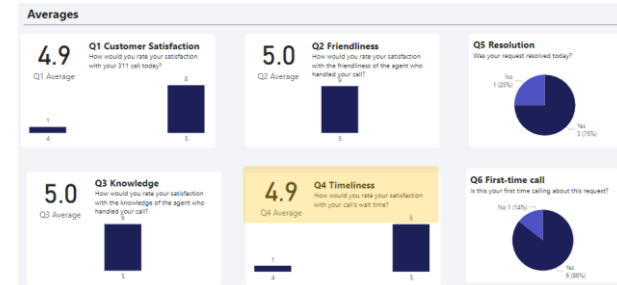
Utilities



311



Morris



Factors that could affect satisfaction with timeliness

- Time to dequeue
- Queue time
- Hold time
- Time of day
- Call time
- Number of transfers
- Call topic
- Others?

Proposed action plan

Observations



Possible Actions

% Calls opted into survey from calls handled decreased by 99% from Q4 2022 to Q1 2023

Idea: Test if survey for each line is still working

Idea: Send refresher on conducting survey to call takers for each line

Lowest average rating for all lines (all-time) is Q4 Timeliness

Idea: Research factors that could affect satisfaction with timeliness

COSB Post Call Survey Results | 311

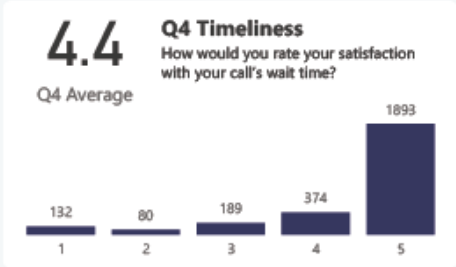
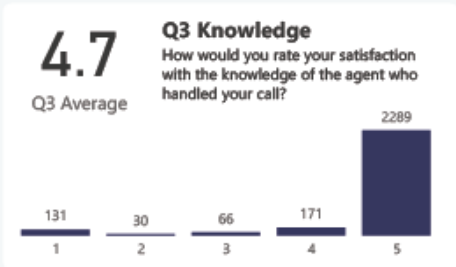
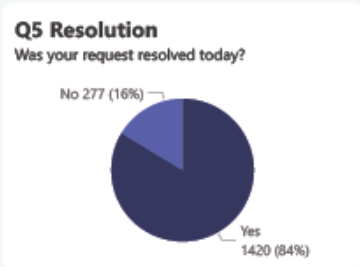
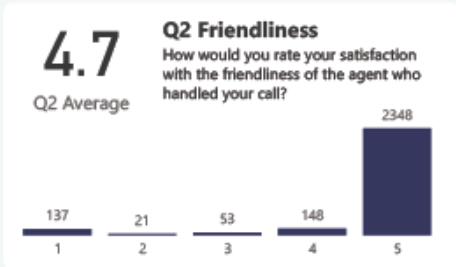
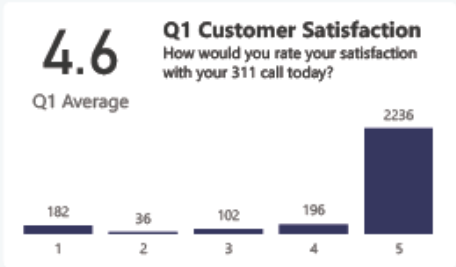


COSB Post Call Survey Results | 311

4/27/2022 3/23/2023
 Earliest Date Latest Date

Answered 1 question	Calls opted in	Calls handled	% Calls opted in from handled	% Answered 1 question from calls opted in
2752	6265	56K	11%	44%

Averages

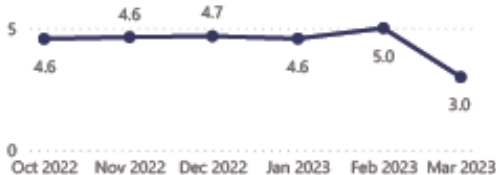


COSB Post Call Survey Results | 311

Averages over time (past 6 months)

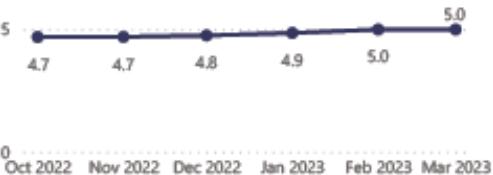
Q1 Customer Satisfaction

How would you rate your satisfaction with your 311 call today?



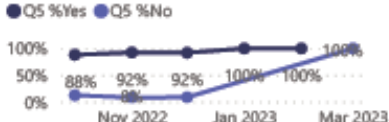
Q2 Friendliness

How would you rate your satisfaction with the friendliness of the agent who handled your call?



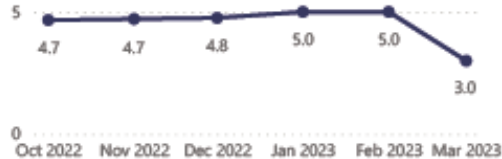
Q5 Resolution

Was your request resolved today?



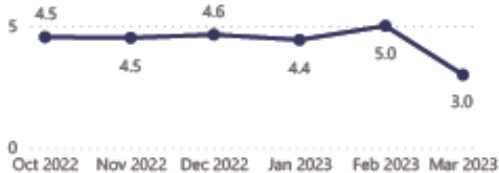
Q3 Knowledge

How would you rate your satisfaction with the knowledge of the agent who handled your call?



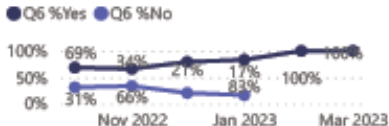
Q4 Timeliness

How would you rate your satisfaction with your call's wait time?



Q6 First-time call

Is this your first time calling about this request?



Q7 Transfer

Was your call transferred from 311?



COSB Post Call Survey Results | Utilities

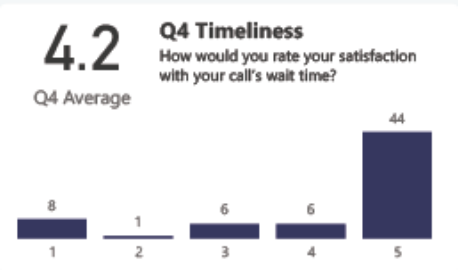
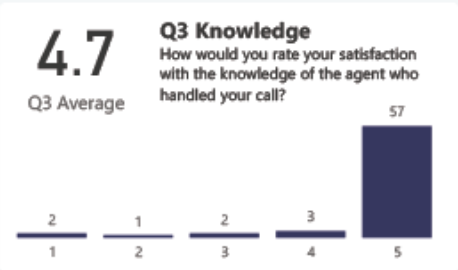
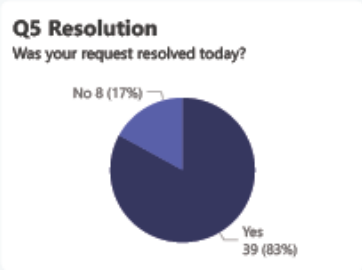
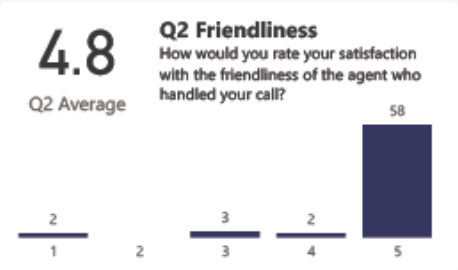
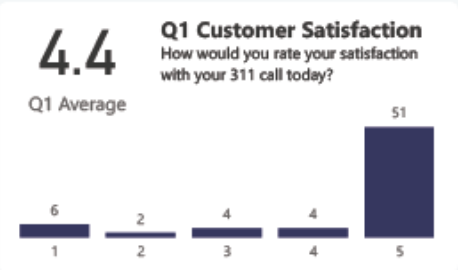


COSB Post Call Survey Results | Utilities

4/27/2022 3/9/2023
 Earliest Date Latest Date

Answered 1 question	Calls opted in	Calls handled	% Calls opted in from handled	% Answered 1 question from calls opted in
67	175	14K	1%	38%

Averages



COSB Post Call Survey Results | Utilities

Averages over time (past 6 months)

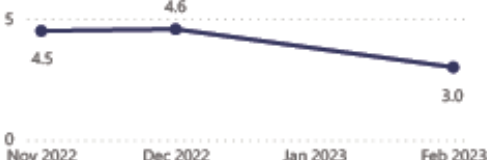
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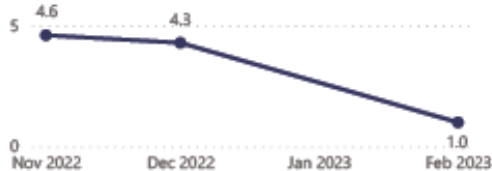
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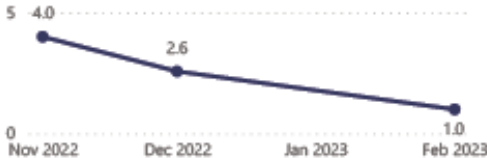
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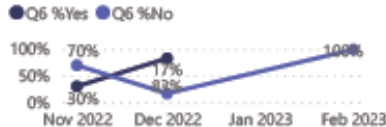
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Q6 First-time call

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Q7 Transfer

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COSB Post Call Survey Results | Morris

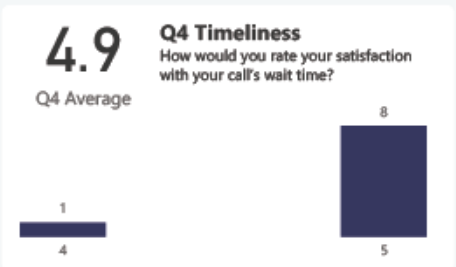
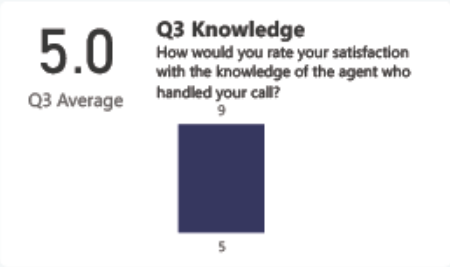
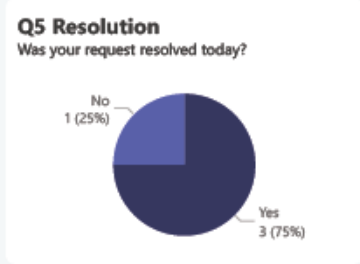
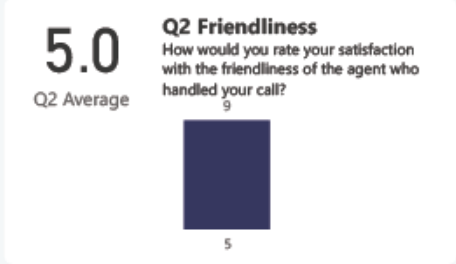


COSB Post Call Survey Results | Morris

8/18/2022 10/5/2022
 Earliest Date Latest Date

Answered 1 question	Calls opted in	Calls handled	% Calls opted in from handled	% Answered 1 question from calls opted in
9	21	411	5%	43%

Averages



COSB Post Call Survey Results | Morris

Averages over time (past 6 months)

Q1 Customer Satisfaction

How would you rate your satisfaction with your 311 call today?



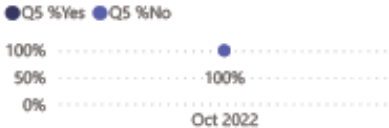
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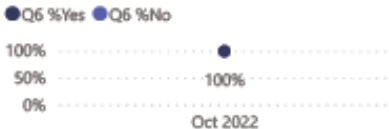
Q5 Resolution

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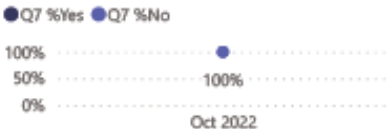
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Q3 Knowledge

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Q4 Timeliness

How would you rate your satisfaction with your call's wait time?



Deep-dive analysis & discussion

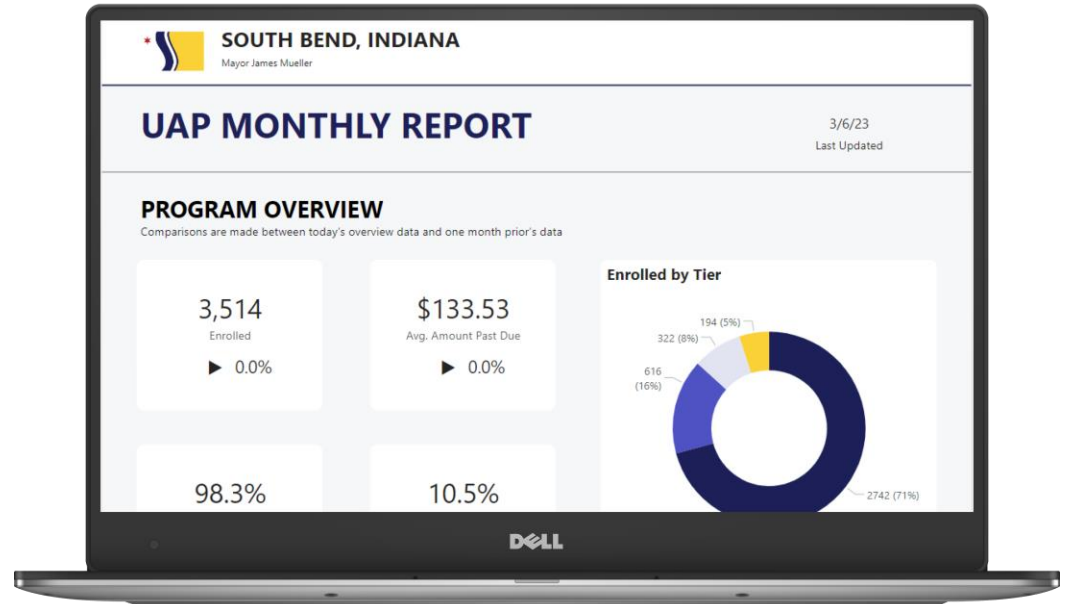
Diving deep into a few key initiatives being undertaken to improve city performance

- Utility data report
- Customer service culture



Utility data report

Review utility data in monthly report



Discussion questions before closing out the topic

1. The following slides present utility data on UAP and overall payment behavior –
 - Does the utility data report provide answers to useful data questions?
 - How do you see your team using this report?
 - What barriers do you see for your team using this report?
2. This report was developed to enable the City to evaluate the current state and develop new policies for utilities. Which strategy area should we use the report to look at in the next quarter?

Strategy area	Examples
Existing programs	<ul style="list-style-type: none">• Updating UAP discount amount
New programs	<ul style="list-style-type: none">• Developing application-based forgiveness program, repeated Utility Relief program, etc.
Processes/Policies	<ul style="list-style-type: none">• Developing more flexible payment plans• Adding texting reminders to pay bill

Defining the problem

Problem Statement

- *Leadership (Mayor, CIO, Utilities directors, Civic Innovation)* need quick access to summarized utilities data to make informed decisions on utilities policies, services, and programs.
 - Ex: Determining UAP discount amount
 - Ex: Potential repeated Utility Relief program
- *The Business Analytics team* has historically helped with summarizing data. This process has been time-consuming and inefficient.

How might we...

- How might we develop a more efficient process to review a consistent source of truth for summarized utilities data?

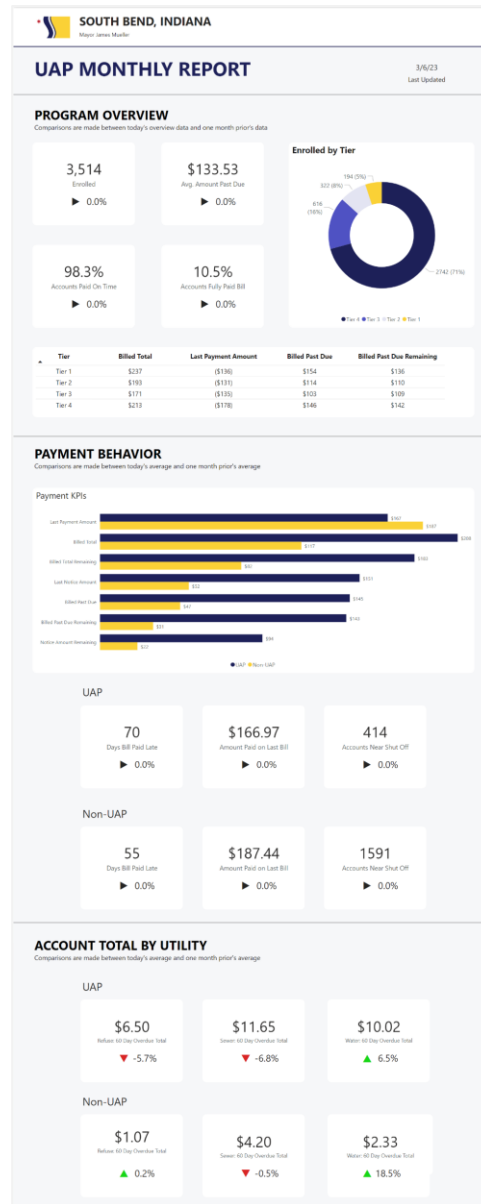
Outcome Metric(s)

- *BAs* – Decreased time for summarizing utilities data
- *Leadership* – Improve KPIs outlined in utility data report

UAP Monthly Report

Goal: A more efficient process to review summarized utilities data

- enQuesta data directly connected to Power BI
- Monthly email notification with report



Program Overview

- # Enrolled
- \$ Avg. Amount Past Due
- % Accounts Paid On Time
- % Accounts Fully Paid Bill
- % Enrolled by Tier
- Summary Table by Tier

Payment Behavior

UAP & Non-UAP

- Bar chart of payment KPIs
- # Days bill Paid Late
- \$ Amount Paid on Last bill
- # Accounts Near Shut Off

Account Total by Utility

UAP & Non-UAP

- \$ Refuse: 60 Day Overdue Total
- \$ Sewer: 60 Day Overdue Total
- \$ Water: 60 Day Overdue Total

UAP Outreach Summary

Outreach Activities

- UAP Sign up-a-thon events (Q4 2022)
- Supporting South Bend Pilot Group (Q1 2023)
- Outreach Team: Q4 2022 – Q1 2023

UAP Sign up-a-thon events (Q4 2022)

Partnered with 11 organizations to host 36 events, enrolling 1,160 residents

Organization	UAP	EAP	TOTAL
Housing Authority	45	168	213
Goodwill	6	11	17
St. Adalbert's	12	15	27
Near Northwest Neighborhood	3	17	20
African American Resource and Culture Center	59	71	130
Connect2bethechange	53	91	144
AB Life and Enterprise LLC	35	95	130
BFrank & Heal	56	100	156
Imani Unidad	3	1	4
SJC Community Health Workers	39	41	80
Coquillard Elementary School	17	15	32
TOTAL	328	625	953

UAP Outreach Summary

Outreach Activities

- UAP Sign up-a-thon events (Q4 2022)
- Supporting South Bend Pilot Group (Q1 2023)
- Outreach Team: Q4 2022 – Q1 2023

Supporting South Bend Pilot Group (Q1 2023)

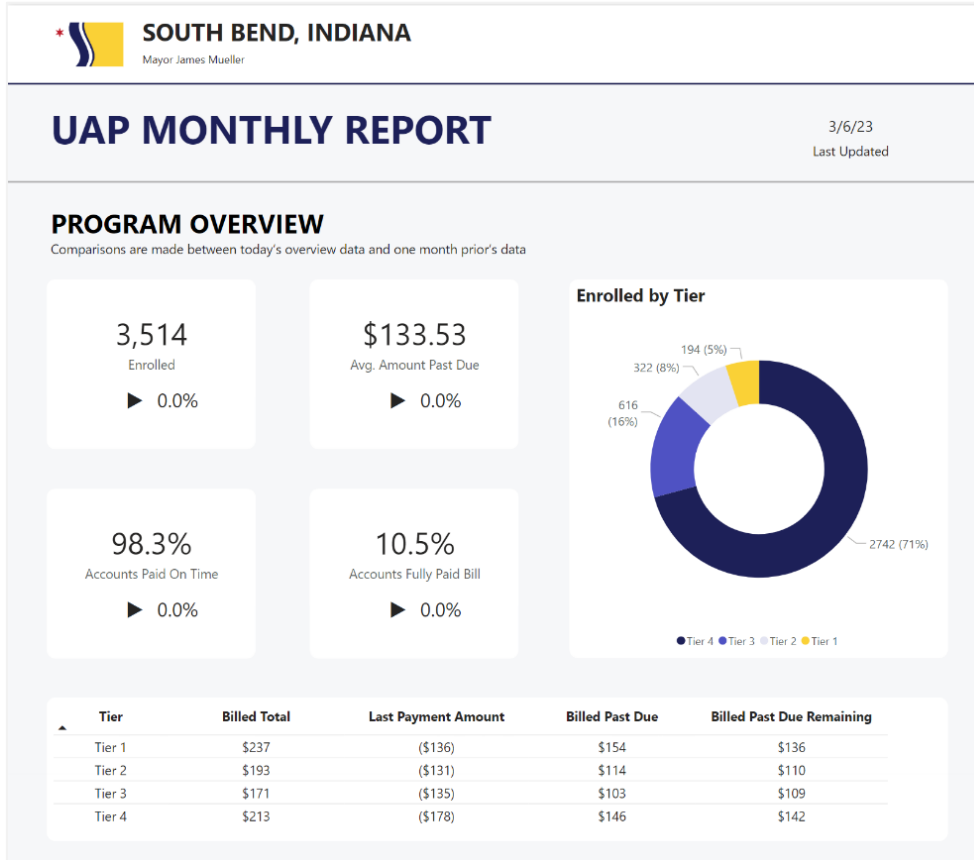
In February 2023, we launched the Supporting South Bend Pilot Group to:

- *Bring social service providers together to share projects and initiatives*
- *Goal is that social service orgs/ reps are more knowledgeable about resources in the City, + better able to assist residents in accessing the resources they need.*
- Presenters have included:
 - Goodwill's Excel Center
 - Portage Township Trustee
 - United Way/1Roof SE Neighborhood Center
 - St. Vincent de Paul

Outreach Team: Q4 2022 – Q1 2023)

Residents spoken with: 1,058
Applications submitted (EAP-UAP): 309

Program Overview



Discussion

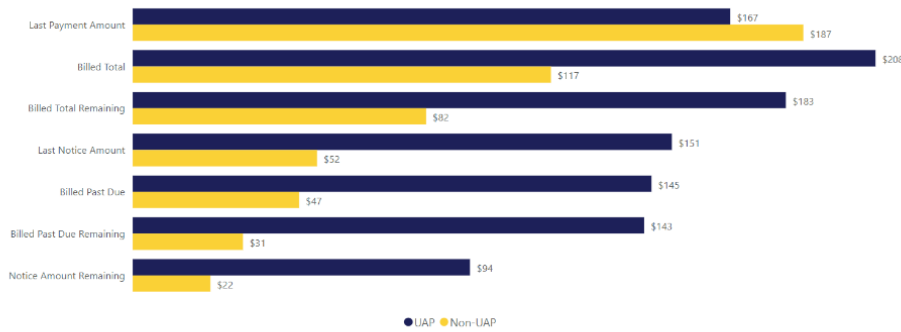
1. Most & least helpful KPIs?
2. Any results that stand out to you?
3. Ideas for using **UAP program data** to inform utilities policies, services, and programs?

Payment Behavior

PAYMENT BEHAVIOR

Comparisons are made between today's average and one month prior's average

Payment KPIs



UAP

70

Days Bill Paid Late

▶ 0.0%

\$166.97

Amount Paid on Last Bill

▶ 0.0%

414

Accounts Near Shut Off

▶ 0.0%

Non-UAP

55

Days Bill Paid Late

▶ 0.0%

\$187.44

Amount Paid on Last Bill

▶ 0.0%

1591

Accounts Near Shut Off

▶ 0.0%

Discussion

1. Most & least helpful KPIs?
2. Any results that stand out to you?
3. Ideas for using **payment behavior data** to inform utilities policies, services, and programs?

Account Total by Utility

ACCOUNT TOTAL BY UTILITY

Comparisons are made between today's average and one month prior's average

UAP

\$6.50

Refuse: 60 Day Overdue Total

▼ -5.7%

\$11.65

Sewer: 60 Day Overdue Total

▼ -6.8%

\$10.02

Water: 60 Day Overdue Total

▲ 6.5%

Non-UAP

\$1.07

Refuse: 60 Day Overdue Total

▲ 0.2%

\$4.20

Sewer: 60 Day Overdue Total

▼ -0.5%

\$2.33

Water: 60 Day Overdue Total

▲ 18.5%

Discussion

1. Most & least helpful KPIs?
2. Any results that stand out to you?
3. Ideas for using **account total data** to inform utilities policies, services, and programs?

Taking Action

The problem	<ul style="list-style-type: none">• <i>Leadership (Mayor, CIO, Utilities directors, Civic Innovation)</i> need quick access to summarized utilities data to make informed decisions on utilities policies, services, and programs.<ul style="list-style-type: none">• Ex: Determining UAP discount amount• Ex: Potential repeated Utility Relief program• <i>The Business Analytics team</i> has historically helped with summarizing data. This process has been time-consuming and inefficient.
Outcome metrics	<ul style="list-style-type: none">• <i>BAs</i> – Decreased time for summarizing utilities data• <i>Leadership</i> – Improve KPIs outlined in utility data report
Action items	<ul style="list-style-type: none">• <i>Mayor, CIO (I&T), Utilities directors</i> – Develop strategy for helping vulnerable South Bend households based on observed data in monthly reports• <i>Civic Innovation (I&T)</i> – Develop outreach strategy from geographic UAP data insights• <i>BA team</i> – Conduct additional analyses to supplement monthly report as needed

Action items

Mayor, CIO (I&T), Utilities directors

Goal

- Prevent evictions and water shut offs

Actions

- Develop strategy for helping vulnerable South Bend households based on observed data in monthly reports

Strategy area	Examples
Existing programs	<ul style="list-style-type: none">• Updating UAP discount amount
New programs	<ul style="list-style-type: none">• Developing application-based forgiveness program, repeated Utility Relief program, etc.
Processes/Policies	<ul style="list-style-type: none">• Developing more flexible payment plans• Adding texting reminders to pay bill

Discussion questions before closing out the topic

1. We presented a new utility data report on UAP and overall payment behavior –
 - Does the utility data report provide answers to useful data questions?
 - How do you see your team using this report?
 - What barriers do you see for your team using this report?
2. This report was developed to enable the City to evaluate the current state and develop new policies for utilities. Which strategy area should we use the report to look at in the next quarter?

Strategy area	Examples
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Processes/Policies	<ul style="list-style-type: none">• Developing more flexible payment plans• Adding texting reminders to pay bill

Best Practices Review Track



Discussion questions before closing out the topic

1. Which of these would you want to test in the next quarter?
2. Which of these do you think is most feasible?

1 Encourage & reward good customer service

- Internal recognition
- Public recognition

2 Develop standards for good customer service

- Internal training
- External training

3 Provide leadership for good customer service

- Public announcements (ex: executive orders, strategy plans, etc.)

Defining the problem

Problem Statement

- City staff interact with residents in many ways, from calls to neighborhood meetings. Each interaction is an opportunity to provide excellent customer service.
- A stronger culture of customer service will empower City staff to improve resident interactions.

How might we...

- How might we create an environment where all employees are valued and awarded for their commitment to delivering exceptional customer service?

Outcome Metric(s)

- Increased recognition/awards
- Improved standards for good customer service
- Increased public announcements relating to customer service improvements

Recommendations Summary

Effort & Impact



1 Encourage & reward good customer service

- Internal recognition
- Public recognition

2 Develop standards for good customer service

- Internal training
- External training

3 Provide leadership for good customer service

- Public announcements (ex: executive orders, strategy plans, etc.)

1 Encourage & reward good customer service

Recommendations

- Internal recognition
- External recognition

Internal recognition

- Certificates/Awards
 - Customer Service Category
- Team's "Kudos"
 - InsideSB (SharePoint)
- Personalized gifts
- Team luncheons

Public recognition

- Larger dept ceremonies
 - 311 – 10 yr. anniversary
- Web/Social Media shout-outs
 - 82% of workers consider recognition to be an important part of their happiness at work (Survey Monkey).

2 Develop standards for good customer service

Recommendations

- Internal training
- External training

- Internal training
 - Onboarding - 311 shadowing
 - Example - [Standardized Customer Service Training Curriculum for City inspectors \(City of New York\)](#)
 - Requirement by Local Law 33 of 2013
 - [Web and CRM Manual](#)
 - SB Academy
- External training
 - [Zoe Talent Solutions - Customer Service Management Certification Training Course](#)
 - [SkillPath - Instructor-led courses](#)
 - Topics - Communication, leadership, compliance, productivity, teamwork

3 Provide leadership for good customer service

Federal

Share Customer Strategy Plans Publicly

Federal -

- [Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government \(2021\)](#)
 - Using data to inform service delivery decisions
 - Using customer feedback to ensure customer service is a priority on all levels
 - Established a Federal Customer Experience task force to coordinate efforts across all agencies

3 Provide leadership for good customer service

State

Share Customer Strategy Plans Publicly

State -

[NJ Governor Murphy: Resident Experience \(ResX\) \(2022\)](#)

- \$40 million for the Resident Experience Program, or "Res"
- Unified modern login system across key benefit programs and additional "one-stop" websites

[Pennsylvania state executive order \(2019\)](#)

- "Transformation" committee will:
 - a) address roadblocks
 - b) educate on the opportunity and value
 - c) develop quantifiable metrics, service levels, and other reporting mechanisms to determine the performance and the need for corrective action

3 Provide leadership for good customer service

Share Customer Strategy Plans Publicly

City -

- The City of Saint Paul, Minnesota (2022)
 - [passed a resolution](#) authorizing the use of City funds to compensate participants to test technology products.
- [San Francisco - Digital Accessibility and Inclusion Standard](#) (2021)
 - Provide equitable access to all digital services and web content

City

Taking Action

The problem	The city of South Bend wants to improve the culture of customer service. City staff can play a larger role in delivering excellent customer service to community members. This has led to the City to seek out best practices in prioritizing customer's needs and delivering exceptional customer service.
Outcome metrics	<ul style="list-style-type: none">• Increased recognition/awards• Improved standards for good customer service• Demonstrate leadership for good customer service
Action items	<ul style="list-style-type: none">• Review all recommendations and choose 1 to test during Q2

Discussion questions before closing out the topic

1. Which of these would you want to test in the next quarter?
2. Which of these do you think is most feasible?

1 Encourage & reward good customer service

- Internal recognition
- Public recognition

2 Develop standards for good customer service

- Internal training
- External training

3 Provide leadership for good customer service

- Public announcements (ex: executive orders, strategy plans, etc.)

Celebrating our values

This section highlights exemplary work happening in the City to improve performance that may otherwise go unnoticed

10 Year 311 Anniversary!



Cross-departmental collaboration on service request dashboard & utility data report

Teams

- 311
- Utilities
- Solid Waste
- Business Analytics

Actions

- Attended several workshops to co-develop and provide feedback on reporting tools



SBStat | Customer Service

2023 Quarter 1 | Monday, 4/3/23
City of South Bend



Appendix section

Customer Service Reward Summary

Department Luncheon

Rewards or
Certificates of
Recognition

Monetary Awards

Personalized Gifts

Social Media or
Website Shoutouts

Department
Ceremony

Recommendation 1

Department Luncheon

Commonly referred to as the "Pizza Party"

Average costs:

- Pizza in Indiana (2023):
 - Feeds an average of 3 people
 - \$18.66/pizza
- Chipotle Burrito by the Box:
 - Feeds an average of 6 people
 - \$8.75/person

Recommendation 2

Rewards or Certificates of Recognition

- Employee of the Month
- Years of Service
- Customer Advocate
- Company values award:
 - Nominated by managers

Average costs:

- Box of printer paper:
 - About \$20 for 20lbs
- Picture frames:
 - \$5/frame

Recommendation 3

Monetary Awards

In a survey, Genesis Associates found that 85% of employees stated that they were motivated by monetary incentives

Common awards

- Annual raises
 - 10%
- Bonuses
- Gift cards
 - Visa
 - Amazon
 - Restaurant
 - Store specific

Recommendation 4

Personalized Gifts

Personalized gifts can demonstrate appreciation, creating a stronger bond between employer and employee that goes beyond a hierarchical relationship focused on work progress.

- 56% of respondents believe the gifts they've received from their employer are "impersonal" and/or "generic."

Most Common

- Cup or Mug
- Company jacket
- Blanket
- Glass picture frame with team photo
- Favorite treat
- Box of multiple small gifts

Recommendation 5

Social Media or Website Shoutout

In a study:

- 82% of employees in the U.S. don't feel that their supervisors recognize them enough for their contributions (Glassdoor).
- 82% of workers consider recognition to be an important part of their happiness at work (Survey Monkey).

Warning:

- Know your employee!
- Some people are uncomfortable with public callouts.

Recommendation 6

Department Ceremony

Shown to boost motivation and productivity, makes employees feel their hard work is valued. Great reminder of the company's or department's values.

Included:

- Catering
- Decorations
- Press releases/media
- Speeches to provide verbal recognition of the team or an individual

Impact/Effort Matrix

