SBStat | Customer Service

2023 Quarter 2 | Thursday, July 13, 2023
City of South Bend
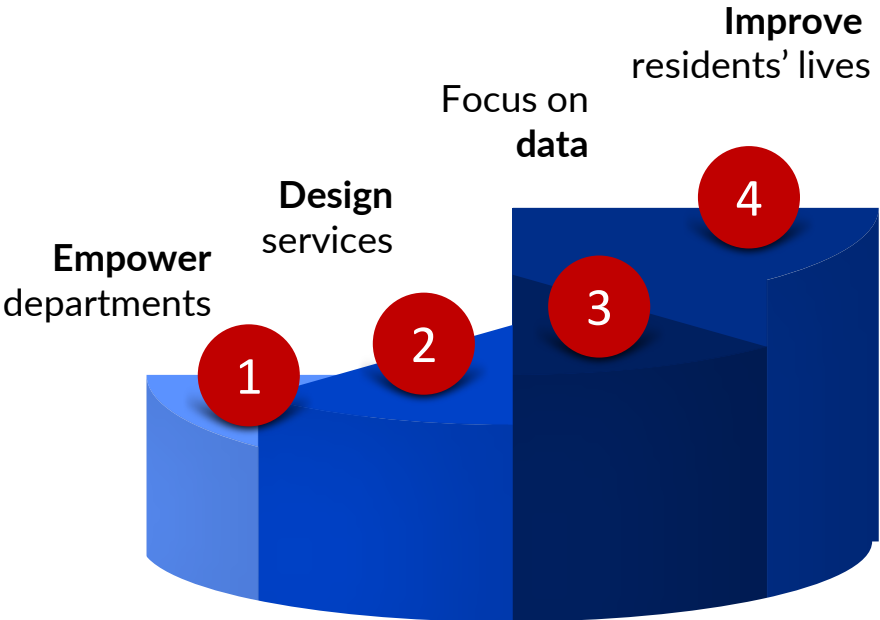
Citywide Performance Management

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

Empower departments

Design services

Focus on **data**

Improve residents' lives

1 2 3 4

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	Purpose in the Stat meeting
Project Leads, analysts, and other key staff	• Lead discussion on assigned projects • Contribute with ideas, knowledge on data sources, and suggestions for improving performance
Mayor & Department Heads	• 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	Improve access to service request performance data and facilitate process improvement	🟢
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	🟢
Solid Waste – 311 Coordination	Reduce the average number of days to complete Solid Waste service requests made via 311	🟢

Legend 🟢 Project on schedule 🟡 Project delayed 🔴 Project cancelled

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Today's Agenda

I. Data summary + action plan on quarterly KPIs

II. Deep-dive on select projects and challenges
- Service request performance dashboard
- Solid waste process improvements

III. Celebrating our values

Customer Service KPI Summary

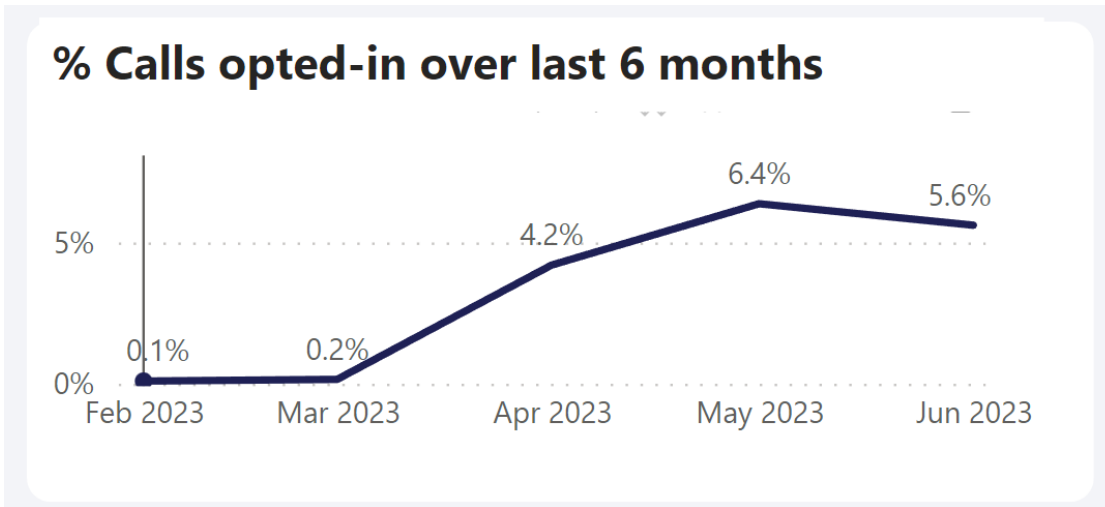| Customer Service KPIs	Type of performance measure	How we measure success	Desired outcome	How the metric aligns with the City's values
Customer Satisfaction	Effectiveness	• Post call survey average ratings at least 4.5 for all categories	Residents receive excellent customer service over the phone	Excellence
Timeliness (Resolution)	Effectiveness	• "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	• "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	• 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	• 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
Q2 2023

Performance Objective	KPI	Q1 2023	Q2 2023	Percent Change
Customer Satisfaction	Average - All post call survey questions	4.6	4.6	— 0%
Timeliness (Resolution)	Percent answered "Yes" to Q5 Resolution	90%	86%	↓ 4%
Timeliness (Communication)	Average – Percent answered "Yes" to Q6 First-time Call	76%	86%	↑ 10%
Culture of Customer Service	Count of Mayor's Employee Recognition award recognizing good customer service	n/a	n/a	n/a

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KPI Review
Percent of calls opted into survey has returned to 2022 levels

% Calls opted-in over last 6 months

		6.4%	
			5.6%
	4.2%		
5%			
0.1%	0.2%		
0%			
Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023

Steps taken to improve performance:

- Recurring meetings to discuss previous month's post call survey data.
- Reminded 311 and Water Works customer service staff to redirect residents to surveys.
- Edited 311 welcome message to inform callers that they will not be placed out of the queue if they decide to opt-in to the survey.

Additional steps to take:

- Add voicemail option to survey
- Manual transfer of residents to survey
- Train Morris Box Office staff to redirect call to survey

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CoSB Post Call Survey Results | 311
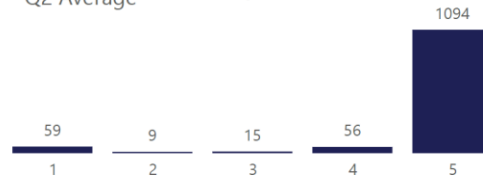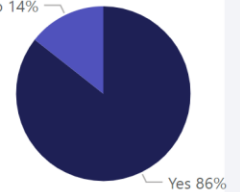
CoSB Post Call Survey Results | 311

Averages over last 6 months

Q1 Customer Satisfaction
How would you rate your satisfaction with your 311 call today?
5.0, 4.3, 4.6, 4.6, 4.5, 4.9 (Feb 2023 – Jul 2023)

Q2 Friendliness
How would you rate your satisfaction with the friendliness of the agent who handled your call?
5.0, 4.7, 4.7, 4.7, 4.7, 4.8 (Feb 2023 – Jul 2023)

Q5 Resolution
Was your request resolved today? (Yes%)
100%, 83%, 90%, 85%, 75% (Mar 2023 – Jul 2023)

Q3 Knowledge
How would you rate your satisfaction with the knowledge of the agent who handled your call?
5.0, 4.4, 4.7, 4.7, 4.7, 5.0 (Feb 2023 – Jul 2023)
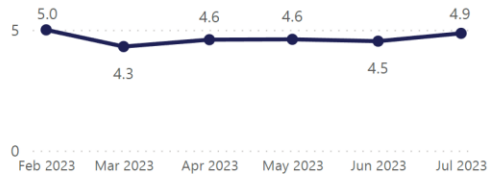
Q4 Timeliness
How would you rate your satisfaction with your call's wait time?
5.0, 4.6, 4.5, 4.3, 4.1, 4.2 (Feb 2023 – Jul 2023)

Q6 First-time call
Is this your first time calling about this request? (Yes%)
100%, 78%, 70%, 72%, 71%, 100% (Mar 2023 – Jul 2023)

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CoSB Post Call Survey Results | Utilities

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CoSB Post Call Survey Results | Utilities

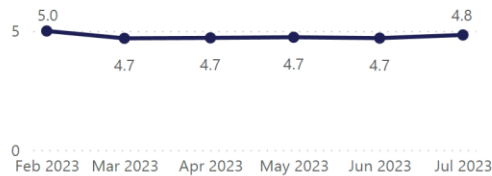

Averages over last 6 months

Q1 Customer Satisfaction
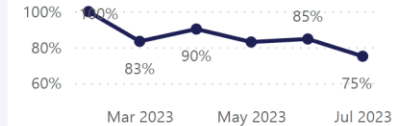How would you rate your satisfaction with your 311 call today?
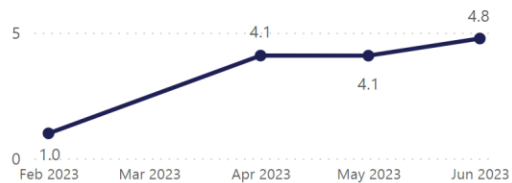
Q2 Friendliness
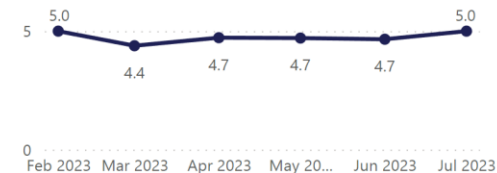How would you rate your satisfaction with the friendliness of the agent who handled your call?
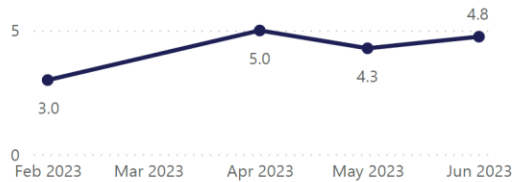
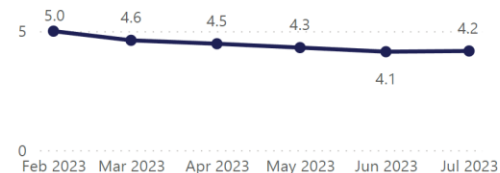**Q5 Resolution**
Was your request resolved today? (Yes%)
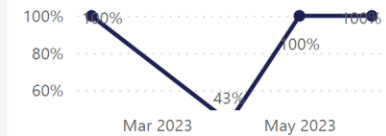
Q6 First-time call
Is this your first time calling about this request? (Yes%)

Q3 Knowledge
How would you rate your satisfaction with the knowledge of the agent who handled your call?
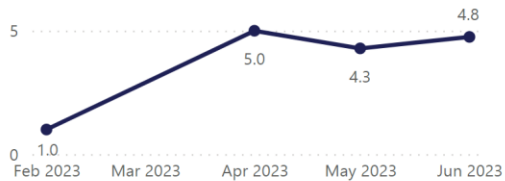
Q4 Timeliness
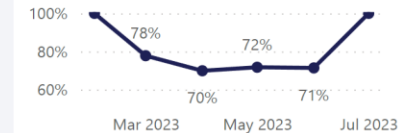How would you rate your satisfaction with your call's wait time?
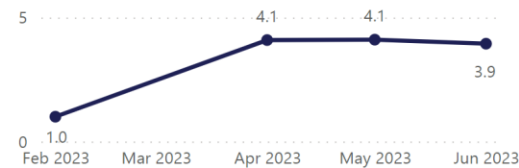
Q7 Transfer
Was your call transferred from 311? (Yes%)

CoSB Post Call Survey Results | Morris
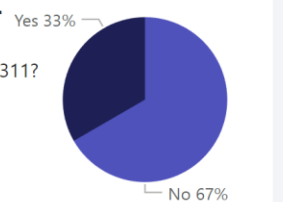
Investigating factors behind lower-than-expected timeliness ratings

★★★

Extra trash pickup, utility account update, and litter services are seeing disproportionally more low timeliness ratings.

Top 7 KBAs by low timeliness ratings

January 2023-June 2023

● Timeliness ● Customer Satisfaction

KBA:
- Request an Extra Pickup for Applian...
- Account Balance & Due Date
- South Bend Utility Assistance Progr...
- Shut-Off Balance and Payment Dea...
- Update Utility Account Information
- Grass and Weed Neighborhood Ser...
- Litter Neighborhood Services & Enf...

(x-axis: Count of sub-5 ratings, 0 to 100)

- There is a greater proportion of low timeliness ratings (1,2,3 or 4s) for the highlighted articles compared to the corresponding overall customer satisfaction rating
- *Initial thoughts*: Some respondents are tying **service request completion time** or call outcome dissatisfaction to timeliness of the call– rating it lower than intended otherwise. This can still be useful to diagnose process inefficiencies.
- *Extra pick up*, *Account balance*, and *Update utility account information* are the most frequent call topics (17% of all calls) among callers who call 10 or more times.

Discussion:
- How can we best ensure callers are satisfied for the listed low timeliness services?

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Proposed Action Plan

Findings ➡️ **Possible action plan**

People who provide low ratings for one question are likely to provide low ratings for all the questions

➡️ Implement voicemail box for post-call surveys to better understand caller frustrations.

Average call time of resident rating 1 is **92 seconds** longer than resident rating a 5 in the first half of 2023

➡️ Ideally, reduce call times for articles with low timeliness ratings (Ideally 6 minutes). Add queue time to customer service KPIs and future analyses

Timeliness rating decreased partially due to additional 311 prepend announcements.
(Total prepend time until caller was placed on queue was around 90 seconds in May/June.)

➡️ **Limit usage of 311 prepend announcements**
- 311 welcome message should be placed before all other announcements.
- Total prepended announcements should not exceed 60 seconds.
- Any additional messages should be relegated to hold time.

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Which services are repeat callers requesting?

★★★

Residents are repeat calling "public" service requests

Which services are receiving the highest proportion of repeat callers?
- Neighborhood service requests e.g. Loose dog, Alley maintenance, NSE structure violations.
  - Exceptions include Compost Availability, and engineering concerns.
- Program and bill inquiries and "directly impacting" service requests such as trash pickup and utilities have little or no repeat callers.
- *Residents that file service requests that are not a burden on a single individual/household have trouble tracking work that is rectifying reported issue.*

> June 22 alley grading request submitted no notes in W/O 5743032679 please c/b with follow up cust just want to know when he can expect alley graded closer time frame already called 3 times for follow up escalated for super 311kc

311 Alley grading call note example. **60% of alley calls are repeat.**

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Recommendations

Build and publish a public tool for residents to look up non-sensitive service requests i.e. **Pizza Tracker**

311 operators could record how many service request look ups are requested by residents on CRM

Resident who filed a service request, which includes sensitive information can be notified via email or phone

Build awareness of service tracking once it is live through 311

Conduct process mapping sessions for NSE violation disputes and identify possible process improvements

Improve data quality between CRM and CISCO databases through a shared key

Does overall customer satisfaction vary by KBA?

★★★

Residents record a lower satisfaction rating for billing–type calls, but can resolve the issue

- Yes: variance of KBA customer satisfaction with more than 10 surveys: range from **3.83** to **5.0.**

- Eleven of the sixteen of the KBAs with <4.5 customer satisfaction have 85%+ resolution rate.

KBA	Customer Satisfaction	Friendliness	Knowledge	Timeliness	Resolution	First time caller	# of Surveys filed
Water Rates & Charges	3.83	4.28	4.17	4.11	100%	76%	18
Weekly Trash Schedule	3.92	4.25	3.83	3.58	100%	60%	12
Return Trip Customer Error	4.00	4.13	4.12	4.16	93%	82%	25
Street Light Issue	4.00	4.33	4.17	3.75	88%	42%	12
Dropped Call Article	4.25	4.67	4.42	4.13	85%	60%	24
Requesting a welfare check on an animal	4.25	4.63	4.19	3.69	64%	64%	16
South Bend Utility Assistance Program (UAP)	4.29	4.33	4.27	4.03	94%	77%	94
Weekly Yard Waste Service	4.31	4.63	4.25	3.50	91%	73%	16
Curb & Sidewalk Reimbursement Program	4.36	4.64	4.45	4.55	90%	91%	11
Account Balance & Due Date	4.39	4.52	4.53	4.17	91%	68%	126
Shut-Off Balance and Payment Deadline	4.42	4.30	4.35	3.96	95%	62%	77
Grass and Weed Neighborhood Services & Enforcement Violation	4.42	4.58	4.52	3.97	68%	68%	33
Lamppost Lighting Program	4.43	4.43	4.43	3.71	100%	86%	14
Supervisor Review	4.43	4.07	4.07	4.21	100%	77%	14
Parking Violations	4.45	4.82	4.82	4.27	67%	36%	11
County Services Information	4.47	4.47	4.73	3.93	82%	53%	15

Deep-dive analysis & discussion

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

- Service Request Dashboard

- Improving Solid Waste and 311 Coordination

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Service Request Dashboard

Daily performance data on City service requests
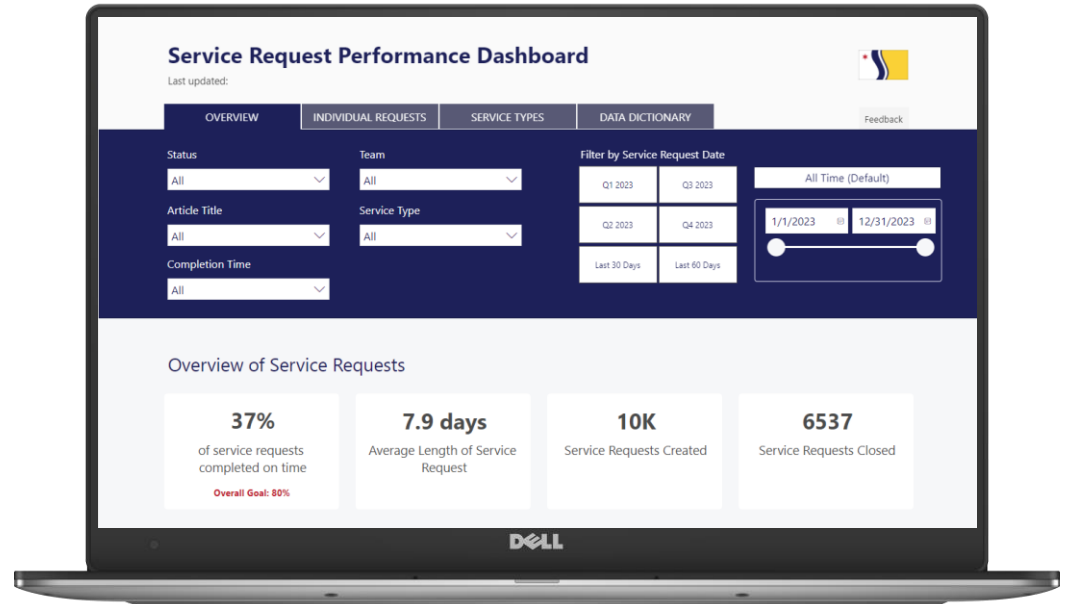
Service Request Dashboard

Problem Statement

City employees do not have easy access to performance data on service requests from residents. There is missing data with the way City teams review service request processes and for 311 to track service request progress. These issues make it challenging to improve the customer experience for residents.

Dashboard Goals

- Make service request performance data accessible so teams can make process improvements
- Track service request statuses from a central location
- Improve data quality
  - Sufficient data quality to launch CRM notifications for residents

Outcome Metric(s)

- Number of business units utilizing data routine meetings
- Number of service requests meeting SLAs
- Percent of service requests statuses that are assigned correctly

Discussion questions to be thinking about

We presented a new service request dashboard for City teams and a monthly data routine process –

1. What barriers do you see for your teams using this dashboard?

2. Any immediate services or research questions we should evaluate?

Background

A total of 58 eligible service requests for tracking

- Not instant and SLA time is less than a week

- The city is accountable for providing the service

Nine high priority service requests:

- Significant request volume and resident interest

- All listed service requests have a work order management system in use

- Two data limitations are **incomplete service statuses** and incomplete breakdown of **general service requests**

- We rated the current state of data quality in CRM on previously mentioned metrics:
    - % of service requests that are closed
    - Data quality of request status types that are aren't closed:

Poor	Fair	Good	Very Good	Excellent
Only "in progress" and completed statuses are used or significant backlog of in progress service requests	Use of three statuses and is not instant: "In progress", canceled, completed	Use of both new and "in progress" statuses	Regular and instant use of nearly all or all status types but no breakdown by request subtype	Regular use of nearly all or all status types and breakdown by work order subtype

Top service requests' current data limitations

Team	Service Request Name	WO system	# of requests per year	% Closed	SR Status data quality rating
Streets	Pothole in Street	Cityworks	840	54%	Poor
Traffic and Lighting	Street Lighting Issue [Report]	Cartegraph	767	62.50%	Fair
Sewers	General Service (Sewers)	Cityworks	610	97.80%	Fair
Streets	Dead Animal in the Street	Cityworks	575	95.30%	Fair
Sewers	Report a Clogged Catch Basin	Cityworks	258	90.40%	Poor
Forestry	Tree Service [Report]	arcGIS	206	41.40%	Poor
Streets	Debris in the Street	Cityworks	190	88.20%	Fair
Streets	**General Service (Streets)**	Cityworks	171	72.50%	Fair
Solid Waste	General Service (Solid Waste)	Routeware	1067	98.20%	**Very Good**

Requires breakdown by KBA

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Dashboard Walkthrough

Theory of Change
Monthly Performance Data Routine

City develops a dashboard that tracks service request performance

- Percent of eligible service requests that have data in the dashboard

BA team facilitates monthly meeting with relevant City teams to review dashboard and identify performance gaps

- Number of teams or departments that have run monthly data routine meetings in 2023
- Number of dashboard views

City teams conduct process improvement activities and/or training to improve data quality

- Percent of Work orders closed
- Number of teams closing work orders at moment of work completion or cancelation
- Number of internal process improvements implemented

City teams continue to meet monthly to review dashboard and evaluate whether interventions have been effective

- Average time to complete service requests
- Percent of service requests meeting SLAs

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Delivery Associates' example data routine template for teams to use

Example Agenda

10 mins	Update group on current SLA target and arrive at a shared view of progress
15 mins	Deep dive on specific issues: • Diagnose and problem solve for why the service request completion time for pot holes has increased by 12% • Discuss how to incentivize staff to use CRM notes more • Strategize how to decrease service completion time in Swanson Park
5 mins	Identity and commit to clear next steps

Discussion questions

- How many SLAs are meeting their 80% target?
- Which SLAs are consistently exceeding their targets?

Progress milestones

Q1 2023 % of SLAs on target	XX%
Q2 2023 % of SLAs on target	XX%
Q3 2023 % of SLAs on target	XX%
Q4 2023 % of SLAs on target	XX%

Action items

- David and Becky work on creating clear service request definitions
- David, Denise, and Max work on system integrations
- Xxx

Notes

- Xxx

- Monthly data routines can be 30 to 60 minutes long
- Does not have to be a standalone meeting – can be supplemented to standard check-ins between department and division leaders

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Next Steps
Project Timeline

Tasks	Start-End		Jul	Aug	Sep	Oct	Nov	Dec
SR Dashboard launched	May 01—Jul 01	Complete	●					
Business unit monthly data routines	Jul 15—Sep 31 (if going well, then will continue indefinitely)	Not started	●————————————● - - - - - - - - - - - - - - ●					
Process improvement activities	Sep 01-Sep 31 (if going well, then will continue indefinitely)	Not started			●————————● - - - - - - - - - - ●			
Cityworks/CRM integration	Jul 01—Sep 31	Ongoing	●————————————●					
Team data quality info gathering and training	Aug 01—Oct 31	Not Started		●————————————————●				
Remaining CRM integrations	Oct 01—Dec 31	Not started				●————————————●		
Analysis of process improvement and training activities	Dec 01 – Jan 15	Not started						●

Taking Action

The problem	City employees do not have easy access to performance data on service requests from residents. There is missing data with the way City teams review service request processes and for 311 to track service request progress. In brief, these issues makes it challenging to improve the customer experience for residents.
Outcome metrics	• Number of business units utilizing data routine meetings • Number of service requests meeting SLAs • Percent of service requests statuses that are assigned correctly
Action items	• Division leaders and department heads can **start using the dashboard** to ensure business units meet SLAs and investigate service request complaints on a regular basis. • Overview data from Service Request Dashboard to be presented at future Stat meetings • The IT project team will **meet with teams with high priority service requests** to gather information to build the service request tracker and train them to progress and close out work orders if needed. • Crews should continue to mark progress and **close out service requests** on their work order management systems.

Discussion questions before closing out the topic

We presented a new service request dashboard for City teams –

1. What barriers do you see for your teams using this dashboard?

2. Any immediate services or research questions we should evaluate?

Performance Improvement --> Streamlining Solid Waste & 311 Service Request Process

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Defining the problem

Problem Statement

Service requests from residents that are made directly to the Solid Waste division are responded to more quickly than service requests made by residents to 311. This is a problem for residents because there is inequity in how quickly the City is responding to their service request.

How might we...

- ...improve our process so residents do not experience inequity?

- ...improve coordination between 311 and Solid Waste?

Outcome Metric(s)

- Average number of days to complete Solid Waste service requests made via 311

Background

Residents currently have multiple ways to request a service from the Solid Waste team, (1) through 311 via CRM and (2) through a Microsoft Form

Data Analysis

Work Orders from 311 charge codes take longer than those from non-311 charge codes
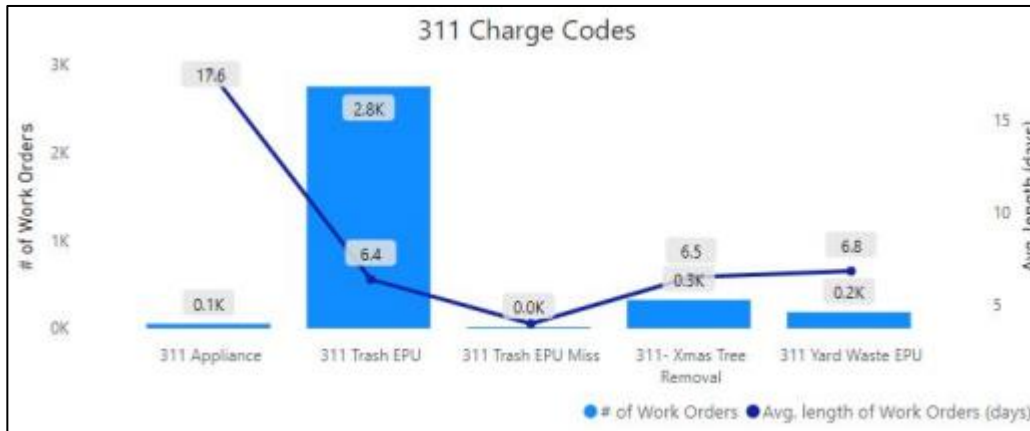
Data insights

- All 311 charge codes, except for "311- Xmas Tree Removal", include more work orders than their non-311 counterpart charge code.

- Work Orders from 311-related charge codes take significantly longer than work orders from non-311 charge codes.
    - Largest difference of 4.5 days between Appliance (13.1 days) and 311 Appliance (17.6 days) Work Orders

Hypothesis

- Work Orders created via 311 calls may involve additional steps that delay work orders from being finished.

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Theory of Change

I&T develops single form to centralize resident service requests and automate manual processes conducted by Solid Waste team

→

Service request is processed through City's CRM and Microsoft Power Platform, refers to Routeware database, and prepares automatic email to resident that notifies them the date of the pick up (once date is set).

→

Solid Waste schedules responses to work orders in one view in Routeware, rather than multiple views in Routeware

→

Service requests are responded to equitably, regardless of the method residents use to contact the City

- One form per Solid Waste service request type

- Automated emails to notify residents of the date Solid Waste will respond to service request

- Time saved for Solid Waste team

- Time saved for Solid Waste team

- Average number of days to complete Solid Waste service requests made via 311

Taking Action

The problem	Service requests from residents that are made directly to the Solid Waste division are responded to much faster than service requests made to 311. This is a problem for residents because there is inequity in how quickly the City is responding to their service request.
Outcome metrics	• Average number of days to complete Solid Waste service requests made via 311
Action items	• Create a single form for residents to submit Solid Waste service requests to (I&T) 　　• Automate email notifications to residents • Remove duplicate forms from City website, other marketing materials (Solid Waste)

Celebrating our values

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

Celebrating our Values

First monthly data routines with all City call liaisons with 311, Utility, Morris

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Post call survey dashboard

Findings and Proposed Action Plans on Q2 KPIs

Findings	Proposed Action Plan
People who provide low ratings for one question are likely to provide low ratings for all the questions	Implement voicemail box for post-call surveys to better understand caller frustrations.
Average call time of resident rating 1 is 92 seconds longer than resident rating a 5 in the first half of 2023	Ideally, reduce call times for articles with low timeliness ratings (Ideally 6 minutes). Add queue time to customer service KPIs and future analyses
Timeliness rating decreased partially due to additional 311 prepend announcements. (Total prepend time until caller was placed on queue was around 90 seconds in May/June.)	Limit usage of 311 prepend announcements • 311 welcome message should be placed before all other announcements. • Total prepended announcements should not exceed 60 seconds. • Any additional messages should be relegated to hold time.
Services that receive the highest proportion of repeat callers: • Neighborhood service requests e.g. Loose dog, Alley maintenance, NSE structure violations. • Exceptions include Compost Availability, and engineering concerns. Program and bill inquiries and "directly impacting" service requests such as trash pickup and utilities have little or no repeat callers. Residents that file service requests that are not a burden on a single individual/household have trouble tracking work that is rectifying reported issue.	Conduct process mapping sessions for NSE violation disputes and identify possible process improvements. Improve data quality between CRM and CISCO databases through a shared key
Residents record a lower satisfaction rating for billing-type calls, but can resolve the issue	None at this time.

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Appendix section

22% of calls are from one-time or anonymous callers

Breakdown of call counts by caller frequency
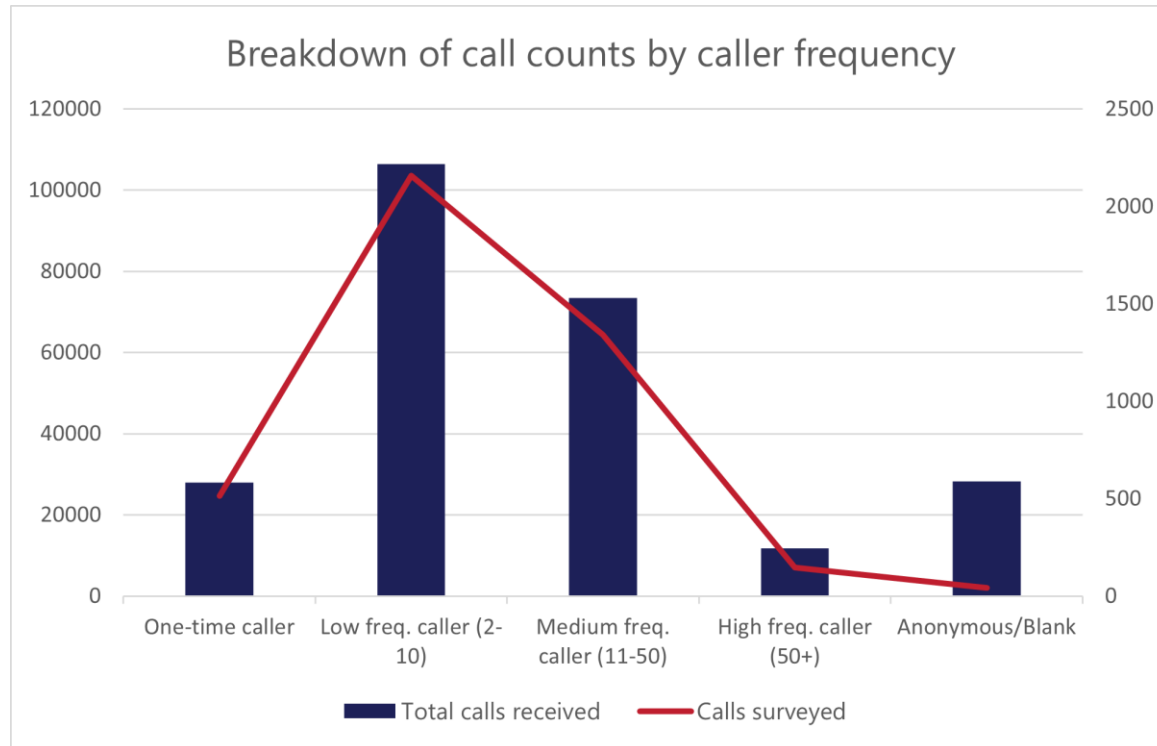
- Surveys from each caller frequency types are roughly represented except for anonymous/blank.
- Low variance of customer satisfaction and timeliness ratings by call frequency (4.43 – High freq avg, 4.58 – One-time avg).

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Share of service requests by medium to high volume repeat callers

%GT Count of cosb_name_1 by KBAname and 311 caller type

311 caller type ● Medium repeat caller
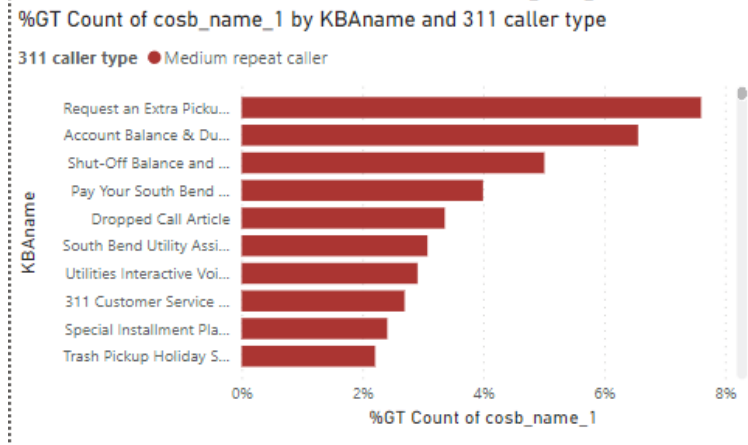
Call time by timeliness rating
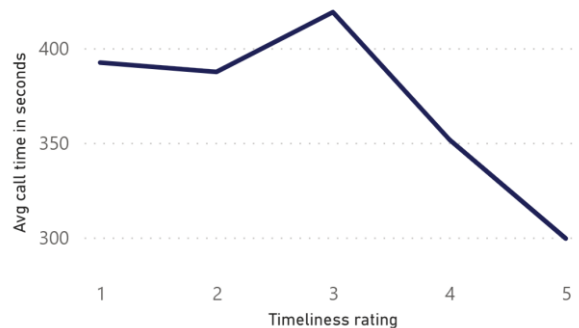
On average, how many days back did a repeat caller last call 311 regarding the same article? 28 days
- There might be inconsistencies in the data or callers misinterpreted the survey question

Breakdown of Q1 and Q4 ratings by caller type

Caller Type	Count of sessionid	%GT Count of sessionid	Average of Q1 Customer Satisfaction	Average of Q4 Timeliness
Anonymous	2	0.05%	5.00	5.00
	39	0.93%	4.85	4.67
Single caller	513	12.22%	4.58	4.35
Low repeat caller	2157	51.37%	4.57	4.41
Medium repeat caller	1342	31.96%	4.53	4.37
High repeat caller	146	3.48%	4.43	4.33
Total	**4199**	**100.00%**	**4.56**	**4.39**

Data routine folder

- [Data routine materials](#)
  - ➢ Data routine template
  - ➢ Data routine tracker and process improvement idea list

DA.Digital suggests the City incorporate a new routine to review the dashboard.

Routine Design Questions	DA's suggestion for a new routine on the dashboard
Who is receiving information?	Mayor Mueller
Who is being held accountable?	Department heads
What other stakeholders will be involved?	Denise, David, Max, and as needed leads that are responsible for SLAs, 311(Cathleen, Kyle, or Cynthia)
How frequent will the routine be?	Quarterly

What form will the routine take?	Quarterly meeting with the Mayor answering:
	• Where are we now?
	  ○ How many SLAs are meeting their near their 80% target?
	  ○ Are neighborhoods receiving equitable service?
	• What is holding us back?
	  ○ What SLAs are experiencing challenges?
	  ○ Why is that?
	• What will we do about it?
	• What is next?

What subsets of data will be appropriate to cover?	Determine which areas, service types, teams, and knowledge articles should the City analyze and prioritize
What outcomes will occur?	• Clear image of what success looks like and jointly agreed upon next steps

DA.Digital

Delivery Associates recommendation slides

After researching best practices and analyzing initial dashboard data, DA.Digital has

Recommendations

A. Prioritize **addressing street light issues along Miami St.** between St. Joseph River and US-20

B. Prioritize **addressing general service** (code enforcement) service requests **in the southwest area**

C. Analyze **data at the service type and individual service request level** to find patterns within specific departments

D. Provide **additional CRM training** for staff

E. **Invest in** three core skill sets **(data visualization, data architecture and engineering, and operations)** to maintain the dashboard and support the data system

F. Add logic to **address "on hold" and "external time"** in a future dashboard update

G. **Embed the dashboard in routine meetings** or develop a routine specifically for dashboard review

H. Develop a **public facing version** of the dashboard

DA.Digital

DA.Digital recommends prioritizing street light issues along Miami Street between St.
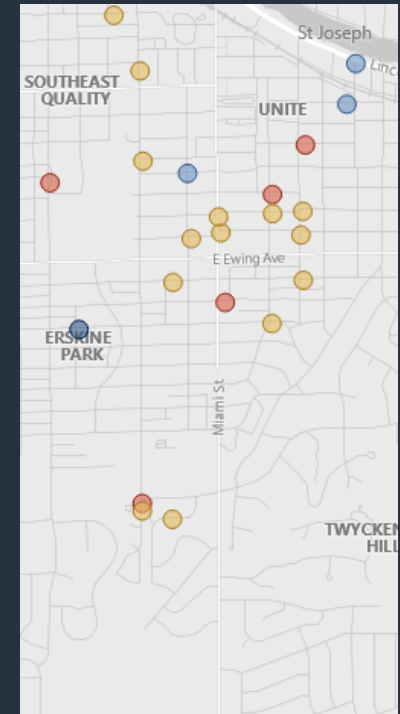
What does the data show?

- A high concentration of service requests (22) for street light issues have been created in this area since January 1, 2023

- 9 of 22 (41%) of street light-related service requests are still open

- All 13 completed requests were finished "Very late (>40% over)" and took an average of 472 hours (20 days) to complete vs 402 hours (17 days) for South Bend

- Data from the Incidents + Crime Dashboard also shows a concentration of incidents reported in the same area

SLA Dashboard

Incidents + Crime Dashboard

Legend:
- Very late (>40% over)
- Open

DA.Digital

DA.Digital recommends addressing "General Service (Code Enforcement)" service

What does the data show?

- A large concentration of service requests categorized as the "General Service (Code Enforcement)" in the southwest area (highlighted in green)

- 34 of 62 (55%) General Service Code Enforcement service requests were completed very late (> 40% of their expected SLA time)
  - 45% of all General Service Code Enforcement service requests in this green area met their SLA vs 55% for all of South Bend

- 33 of 62 (53%) service requests are "Neighborhood Parking Guidelines" service type

- The green area covers Census Tracts 22, 24, and 26
  - The average estimated 2021 Census median household income of this green area is $37,720 which is lower than the South Bend median household income of $46,002
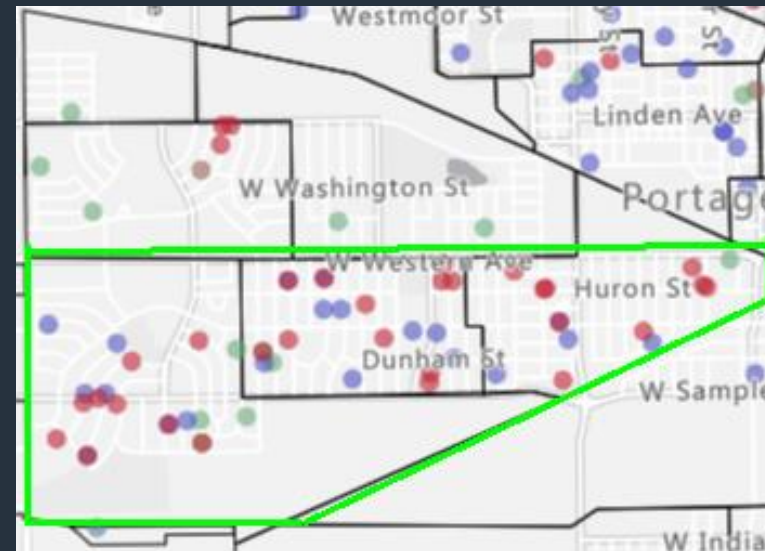
DA.Digital recommends analyzing data at the service type and individual service

What are the benefits?

- Avoid comparisons between different departments since they have different processes

- Allow departments to identify their own strengths and weaknesses

- Create opportunities for departments to provide additional context to their performance for each Service Type and Knowledge Article

- Provide a detailed analysis when viewing individual service requests

  - Help find patterns of quickly closed or overdue service requests

When selecting KPIs for data analysis at the service type and individual service request level, what framework should you use?

- Analyze and prioritize data using the 3M framework. Is the KPI:

  - *Meaningful* for residents, departments, and leadership?

  - *Measureable* by the dashboard and other supporting data?

  - *Movable* the city has control of the process and its weakness?

DA.Digital

DA.Digital recommends that South Bend provides additional training for staff to

What is an activity plan?
An activity plan is a support material for a training, workshop, or important meeting. It is useful to make sure that the planner has considered all the relevant parts of the meeting so you achieve its objectives.

What does it have?
- A list of identified participants
- Established objectives to meet the needs of the participants and get them to intended outcomes
- An outline of interactive activities to help participants achieve outcomes
- List of necessary support materials for the activities
- A refined agenda

For more information on activity plans and how to make them, please refer to the slides in the appendix.

DA.Digital

Delivery Associates' recommendations on when teams should update service request statuses:

Status Change	Acceptable Reasons	Example Note Templates
New -> In Progress	• Dispatched to crew	"Dispatched to [user or team] on [date]"
In Progress -> On Hold	• Out of season • Adverse weather • Supply issues • Requires investigation • More information is needed (follow up with resident required, consider sending to 311)	"On hold for [reason] service should resume on [date]"
On Hold -> In Progress*	• When the crew can continue/begin work	"[Hold reason] resolve work continuing on [date]
In Progress -> Sent to 311	• Wrong service/team • Request lacking clarity	• "Please ask the resident to clarify [missing information]" • "This appears to be the wrong service type/team please reassign"
311 Reviewed -> In Progress	• Notes clarified • Resident connected • Reassigned to correct team	"[Missing requested information] / [resident clarification]"
In Progress -> Canceled	• Duplicate • Not applicable	"Service cancelled because [reason for cancellation] - [date]"
In Progress -> Completed	• Work completed by crew • Assigned to external organization	"[Completed Condition]"

*Crews may need direct access to improve this process

Tips for writing notes
- Be clear and concise
- Provide all relevant details
- Be specific about the requested action
- Follow up as needed
- Use templates or standard formats

DA.Digital

Excel tables

Customer Service Stat Q2 tables.xlsx

- Repeat callers by KBA [tab 1]