



## City Performance Management

### 2023 Q2 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
<b>Post call surveys</b> Improve frontline customer service interactions	David Yang	Ongoing	●
<b>Service request dashboard</b> Give departments and public line of sight into SLAs and how often they are met	David Yang	Ongoing	●
<b>Utility data report</b> Review utility data in monthly report	David Finley	Ongoing	●
<b>Customer service culture</b> Identify opportunities to develop a culture of customer service among City staff	David Yang	9/2023	●
<b>City hall one stop shop</b> Plan for One Stop Shop for Customer Service at new City Hall	David Yang	9/2023	●
<b>Solid Waste process improvement</b> Integrating 311 and Solid Waste service request forms	David Finley	8/2023	●

Legend      ● Project on schedule      ● Project delayed      ● Project Cancelled      ● Project under consideration / no project timeline

## Next Steps Identified at Stat Meeting

### Post call surveys

Action item	Owner	Proposed deadline
Goal: Increase understanding of resident dissatisfaction		
Implement and transcribe post call survey voicemails	David Yang	Fri, 7/21/23
Analysis of post call survey voicemails in the dashboard	David Yang	Fri, 9/29/23
311 liaison presence at quarterly neighborhood consortium to address service request questions	Cathleen Sutherland	Fri, 9/29/23
Project scope a process for following up low-rated calls	David Yang	Fri, 8/18/23
Improve data linkage between CRM and CISCO databases	David Yang	Fri, 8/18/23
Continued use of extension view in dashboard to ensure agents are directing callers to survey	Shawn / Cathleen	Ongoing
Train Morris Box Office staff to direct residents to survey	Andrew Schreiber	Fri, 8/25/23
Goal: Improve Timeliness satisfaction		
Include call queue time as a Stat KPI	David Yang	Fri, 8/18/23
Develop 311 announcement messages SOPs	David Yang	Fri, 8/25/23
Goal: Improve Equity & Access to City services		
Identify service requests with high quality data to be included	David Yang	Fri, 8/4/23
Include service request count and met SLA% KPI by income levels to future Stat meetings	David Yang	Fri, 8/18/23
Goal: Process improvement of service requests		
Identify pain points in KBAs with low Timeliness ratings	Cathleen	Monthly
Conduct process mapping session for NSE violation disputes	David Yang	Fri, 9/1/23

### Service Request Dashboard

Action item	Owner	Proposed deadline
Goal: Routine usage of Service Request Dashboard		
Monthly data routine meetings by department or division level	David Yang	Ongoing
Include high-level service request metrics at future SB Stat meetings	David Yang	Fri, 9/29/23
Goal: Improve data quality in the dashboard		
Integrate high-priority CityWorks service requests onto CRM	David Yang	Fri, 9/29/23
Train teams to close out service requests in their Work order management system or on CRM	David Yang	Fri, 9/29/23
Goal: Process improvement of service requests		
Design and implement process improvement ideas stemming from data routine meetings	David Yang	Fri, 9/29/23

### 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	David Finley	Monthly
--	--------------	---------

**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	Kacey	Fri, 9/29/23

**Solid Waste process improvement**

Action item	Owner	Proposed deadline
Goal: Reduce divergence of service request completion times		
Create a single form for residents to submit Solid Waste service requests	David Finley	Fri, 7/28/23
Automate email notifications for residents	Jeff Haupt	Fri, 8/25/23
Remove duplicate forms from City website and other marketing material	Cara Grabowski	Fri, 8/4/23