

Superior Performance in Customer Experience and Service: the Customer Informed Organization

Final

The Result:

The desired result of this work plan is a shift in organizational culture that emphasizes, encourages and rewards delivering an excellent customer experience. Customer in this plan is defined as anyone who depends upon your work to complete their work or objectives. As such it both encompasses and redefines the traditional internal-external customer approach. As this culture becomes stronger in Charlotte County Government we expect a higher level of citizen and staff satisfaction, a higher level of performance and a growing reputation for excellent services. As this culture develops, certain behaviors and practices become routine. Among those that would initially be emphasized are:

- Policies are followed consistently
- Expectations are regularly communicated clearly
- Regular staff meetings are held which review and reinforce customer service
- New positions, promotions, and transfers or other position changes including departures are announced in the newsletter

The Goals:

There are eight goals in this plan. These goals overlap and reinforce each other. As these goals have been analyzed, five pathways of various action steps have been determined to be the key means through which the desired culture can be reinforced, fostered and developed and through which progress on the eight goals can be made. As these goals are achieved, the desired culture is created.

The Pathways.

Pathways represent the major avenues through which the desired culture and goals can be achieved. Pathways can be termed strategies. The pathways consist of a number of objectives which as they are completed create movement toward the goals.

The Logic Model

A logic model is simply a high level summary of the reasoning underlying the plan. The model described above is graphically shown below as figure 1. Figure 2 illustrates the point that a single pathway can lead to multiple goals.

Figure 1: The Logic Model



Figure 2: A single pathway can support multiple goals



Goals & Outcomes

Goal #1: Know who our customer is

Outcome: Each county employee can define the person or persons who depend upon their work being accurate, timely and complete.

Goal #2: Increase the personalized experience

Outcome: All customers, whether internal or external, experience personalized customer service through which they experience being heard and understood, respected and solution-orientation.

Goal #3: Increase consistency of the customer's experience

Outcome: The brand and reputation of the County are enhanced as a place/source of dependable and reliable information. The practice of "shopping" for an answer is diminished.

Goal #4: Create on-going feedback loops about the customer experience

Outcome: The County is more aware of the experiences customers are having in a format that enables trend analysis, identification of emerging problems, comparison across units, and identification of highly effective practices. It was also recommend that surveys of various formats not be the only methodology used for feedback. One on ones and focus groups like the ones we are in are excellent formats for certain customers.

Goal #5: Connect the Dots

Outcomes

- An increased understanding by County staff of how the work of the County fits together and how each person's work contributes to larger goals.
- Employees will have an understanding of the overall goals of the organization
- Employees will develop an understanding of the County structure
- Employees will develop a sense of empathy and will deliver better internal customer service
- Employees will feel more connected to the organization and to each other

Goal #6: Provide support tools that would assist with providing a superior customer experience

Outcome: Staff have assistive tools, be that scripts, technology, additional training, and/or support networks that will assist them in helping meet the needs and expectations of customers

Goal #7: Provide training to enhance the ability to provide a superior customer experience

Outcome: Staff have the skills to interact with customers in a manner that leads to a better customer experience

Goal #8: Utilize technology to improve the customer experience

Outcomes:

- Technology enables customers to obtain information more quickly and directly with less staff involvement
- Technology supports the goals of consistency and reliability
- Technology enables staff to find answers more quickly
- Technology support to the goals of increased feedback and dot connecting

Pathways

Pathway 1: Technology

This pathway recognizes that in today's world, the ability to provide an excellent user experience is highly dependent upon technology. Technology enables us to answer questions with greater accuracy and greater speed. It enables us to "see" the issue in real time. Technology enables us to communicate quicker and keep everyone in the proverbial loop. Technology enables us to provide all the various analyses that enable better decision-making and problem-solving. Finally, technology enables us to meet the ever growing expectations of the public for rapid responses.

Priority Objectives with Leader:

- Implement Office 365 (Gordon)
 - Review for legal implications of public records
 - Develop an instant messaging and live chat capacity
- Implement "Public Stuff" app (Gordon)
 - Mobile phone apps
- Improve scorecards and metrics (Gordon)
 - Develop standard as well as department specific metrics and a customer service scorecard
 - Develop a toolkit of consistent feedback methods
- Research search word optimization options (Gordon)
 - Search word optimization so that a searcher can enter a familiar word to them and locate what that service may be called in Charlotte County
 - Conduct a website redesign from a user-friendly perspective that uses commonly understood terms

Objectives for future consideration

- Place pictures of and direct phone numbers for customer service representatives on the web
- Institute a 311 program
- Develop virtual tours of county facilities
- Examine feasibility of technology cadres

Pathway 2: Call Center/Website/Customer Maps

This pathway seeks to make access to the county easier and more personal in order to lessen the frustration of those seeking information or attempting to access a county service. A key component of this pathway is each employee understanding their own customer network, i.e. who is dependent upon your work.

Priority Objectives with Leads:

- Determine the feasibility, costs, and alternatives of a call center (Vicki)
 - Determine the feasibility of eliminating phone trees and replacement with a live person as 1st responder.
 - Develop a summary guide of who does what in the departments that all staff have access to for their use in their work and in responding to public request.
 - Develop and institute a process to keep the summary guide up to date and accurate.
 - Examine moving the switchboard function out of facilities and into the PIO office
- Determine the value and feasibility of ombudsman positions in additional departments. (All directors)

Objectives for future consideration

- Develop customer maps for each department
- Institute a modern voice mail system for all departments
- Use commonly known names on the web-site for county functions
- Improve the hold music

Pathway 3: Policy for Customer Service (SOPs)

The purpose of this pathway is to ensure that is both clear and consistent guidance to staff with respect to customer service. This would involve a set of standard operating procedures, adapted to the distinct services of each department.

Priority Objective with Leads:

- Review revised policy (Directors)

Pathway 4: Training

This pathway is designed to provide the knowledge and skill base that will assist employees to interact with customers in a professional and productive manner.

Priority Objectives with Leads:

- Establish a task team to study expansion and improvement of the Ambassador Program to include consideration of the following actions (Heather):
 - Hold the program for all new hires within 1st year
 - Make an On-line version available (refresher course once/year)
 - Keep materials current
 - Offer more frequently (a minimum of 3 times a year)
 - Establish a system by which each graduate have the opportunity to become a presenter
 - Make it mandatory that managers/supervisors participate in the program
 - Make the program available at the department level
 - Extra points on evaluation for attending
 - Directors support employees attending
 - Review the tying of the Ambassador program to performance ratings
- Review the hiring process to determine legitimate ways to identify customer service traits during the interview process with consideration given to: (Heather)
 - Promote internally for customer service positions
- Develop support systems, such as backups, for frontline customer service representatives to provide needed breaks from particularly stressful interactions. (Claire, Joan, Cassie)
- Develop commonly asked question “scripts” (all directors to identify most frequently asked questions as first step) (Vicki & David)
 - Provide updated department summary sheets re: information and frequently asked questions

Future Objectives

- Develop a job shadowing system.
- Provide frontline customer service representatives with additional training about each department prior to start of position
- Provide uniformed and consistent training for customer service representatives including:
 - Networking with similar staff from other departments to share information & support
- Secure commitment for training by Directors/Managers/Supervisors
- Offer additional training in conflict resolution and anger management
- Provide training in shorter durations and at various locations
- Provide regular re-training for updates
- Offer refresher orientation after a period of time

Pathway 5: Networking/Peer Review

This pathway seeks to support the desired culture by establishing systems to increase networking and peer feedback. In effect it seeks to build a “team” attitude by fostering team supports and expectations. It recognizes that culture cannot be imposed solely via policy or external standards but is something that develops as a result of interactions among the organization’s members.

Priority Objectives with Leads (Danny & Terri)

- Establish a networking program
- Improve cross departmental communications
- Cross training similar functions across departments

Future Objectives:

- Establish a peer development and department review that examines customer feedback, successes, and failures so as to improve quality
- Host monthly networking meetings:
 - For employees in similar positions
 - Cross-department collaboration meetings on projects
- Have Administration and Directors attend quarterly staff meetings of other departments