Creating a Welcoming and Connected City: The Philadelphia Experience

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Creating a Welcoming and Connected City: The Philadelphia Experience

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Foreward

Local government executives and managers must have a tremendous breadth and depth of knowledge in order to do their jobs on a daily basis. They work hard to keep up with all of the many hot topics that come and go depending on the needs and interests in the field.

One topic, however, continues to be a mainstay for the profession is customer service. How do we as local government officials deliver services in a customer-friendly manner? It's an important topic, but one that doesn't always get the attention it deserves. Look online for publications on customer service, and you will find a wealth of resources covering the private sector's approach to providing exceptional customer service but virtually nothing on what the public sector is doing.

This primer—the result of a unique collaboration between Philadelphia's Philly311 center and ICMA—begins to build the knowledge base about how local governments can build customer service into their daily operations. In addition to sharing Philadelphia's experience in building a customer service infrastructure for the city, the primer walks the reader through a step-by-step approach as well as shares interviews with local government professionals and examples from other cities.

My sincere thanks to the city of Philadelphia and Philly311 for their leadership on this topic and their willingness to think creatively about this publication.

Robert J. O'Neill, Jr.
Executive Director, ICMA

1. A Case Study for Shaping Customer Service Infrastructure: The City of Philadelphia's Experience

In 2006, Michael A. Nutter, a former Philadelphia city council member, entered the City of Philadelphia's mayoral race running on a campaign of reform. As a city council member, Mayor Nutter had successfully pushed for anti-pay-to-play legislation, campaign finance reform, and formal establishment of an ethics board. Mayor Nutter's campaign message focused on openness, transparency, and accountability. He pledged to "lower crime; increase high school and college graduation rates; make Philadelphia the greenest city in America; and attract new businesses and new residents" and to "lead an ethical city government, delivering excellent and cost-effective services to all taxpayers."[1]

Strategic Advisory Group

After Nutter won the mayoral election in 2007, the question of how to attract new businesses and residents while delivering excellent service was answered with the establishment of Philly311—the City of Philadelphia's non-emergency call center. In March 2008, a performance management advisory group was formed and charged with developing a performance management system to improve the city's management capacity through the implementation of Philly311.

From the outset, the implementation timeline for Philly311 was ambitious. The goal was to have the new center operational by the end of 2008. Managers Jeffrey Friedman and Patrick Morgan engaged an external consulting group to develop a plan and scope for the 311 system. In June 2008, Mayor Nutter and City Managing Director and Executive Sponsor Camille Barnett approved the implementation strategy. Chief Customer Service Officer Rosetta Carrington Lue joined the Philly311 project team in May 2008, which collectively worked to develop civil service testing requirements for the contact center agents. Thirty departmental liaisons assisted in populating Philly311's knowledge base with more than 2,000 articles about city services and municipal information.

Integrated Technology Solution

In September 2008, the national financial crisis caused a drastic cut in Philly311's budget, affecting its technology implementation. However, the crisis offered the project team a unique opportunity to rely on established city services. Rather than implementing a software-based customer service relationship management (CRM) system, the project team worked with the city's Department of Technology to implement a less expensive web-based solution to serve as the CRM system. This approach enabled agents to look up municipal information and directly enter service requests into the integrated work systems of servicing departments. Philly311's new budget constraints also caused a shift in its hiring plan. Instead of hiring experienced contact

center agents, Philly311 hired internal transfers and employees who would have been laid off due to a revised citywide budget.

Launching of Center and Website

Despite the challenges of building a new center during economically constrained times, the need for a 311 center was unwavering. With full executive support from both Mayor Nutter and the managing director's offices, the project team began to advance the administration's implementation plans and moved forward with staffing, locating a facility, and acquiring technology. Given the recession, the project team adjusted plans accordingly, and officially opened the new center on December 31, 2008.

Following the center's public launch, Philly311 debuted its website in January 2009. The site functioned much like the center. Customers could connect with 311, report an issue, or ask about public services through email. These dual points of contact were a harbinger of the evolving Philly311, which would

become even more accessible to citizens through multiple channels. Cognizant of this need, Philly311 introduced a social media campaign to the public and expanded its reach through social media in October 2009. By allocating resources, the center established a Twitter account that provided citizens a new way to receive information from 311. Philly311's knowledge base manager developed a social media strategy that incorporated both the knowledge base and the city's social media policy.

Neighborhood Liaison Program

For Philly311, connecting with citizens meant more than accessibility: it meant accountability and availability. With a city as large as Philadelphia—and with an above-average percentage of residents living below the poverty line—Philly311 found that trust needed to be established within individual communities to educate and provide access to Philly311. A community engagement coordinator was hired to address community concerns and to oversee the Neighborhood Liaison Program (NLP). The Neighborhood Liaisons Program trained volunteers to record items discussed during community meetings. The program encourages stand-out community leaders to bring their neighbors' public service concerns straight to Philly311. In the program's first year, 600 neighborhood liaisons were trained. Two years after the program's launch, the number of neighborhood liaisons doubled.

Youth Engagement Program

In the summer of 2015 the Youth Engagement Program (YEP) launched. The purpose of the program was to get children engaged in civic programming, and raise awareness about city programs that work with young people. YEP showed children how to submit service requests to the city using 311, and introduced other programs and organizations that would have a positive impact on their future and their communities. YEP aims to encourage youth to think and talk about the power that their actions can have on their community. In collaboration with Education Works, "a nonprofit organization providing support for economically disadvantaged communities[2]" YEP hosted a weekly workshop with over 25 6th–8th graders.

Fast Successes

Only 12 months after Philly311 launched, it received its one-millionth call. The program was working, people were connecting, and public services were being accessed in an efficient manner. Although Philly311

had established itself as an authority in accessing Philadelphia city government, it recognized that there were more opportunities to meet citizens at home, online, and in their communities.

As Philly311 gained traction in the community, Pew Charitable Trusts became interested in the data Philly311 was generating and collecting. In 2010, Pew Charitable Trusts, through its Philadelphia Research Initiative, conducted an independent analysis of Philly311 after its first year in operation. Researchers leading the evaluation found that Philly311 served as "a significant step toward Mayor Nutter's reform goal of giving all residents and businesses easier access to services and basic city information." A citywide survey conducted by the Initiative found that 53 percent of those responding to the survey considered Philly311 "a real step forward for the city."

Philly 311 TV Launch

2010 also saw the introduction of another way to engage with citizens—through the Philly311 Show, which later evolved into Philly311 TV. The show debuted on the city's local public access channel and YouTube. The show served to engage and educate citizens on city services, municipal information, and the functions of specific city roles. The Philly311 Show introduced citizens to the more human side of government through interviews and in-the-field episodes.

Internal Customer Service

In 2011, Philly311's customer service model expanded and incorporated a new audience: internal customers. Under Chief Customer Service Officer Rosetta Carrington Lue, the Customer Service Officers Program and the Customer Service Leadership Academy became available to the city of Philadelphia's employees. The Customer Service Officers Program encouraged departments to elect a customer service officer who would be responsible for creating a customer service strategy, implementing that strategy, creating and collecting data, and sharing best practices with other departments. The Customer Service Leadership Academy taught employees basic facets of customer service in classes hosted by Philly311.

Mobile App Launch

By 2012, Philly311 launched its mobile application. The concept surrounding the mobile app aligned with 311's philosophy and was accessible for citizens. However, beyond being another way for residents to connect with Philly311, the mobile app offered significant operational value. Philly311's mobile app was the first 311 app to be offered in 16 different languages, and it allowed customers to add on-site and real-time images to their service requests. The app is free to the public, allowing anyone with a smart device to download it. An additional benefit was add-on widgets, such as a widget for election days and after-school programs, which could be incorporated when needed.

Measures of Popularity

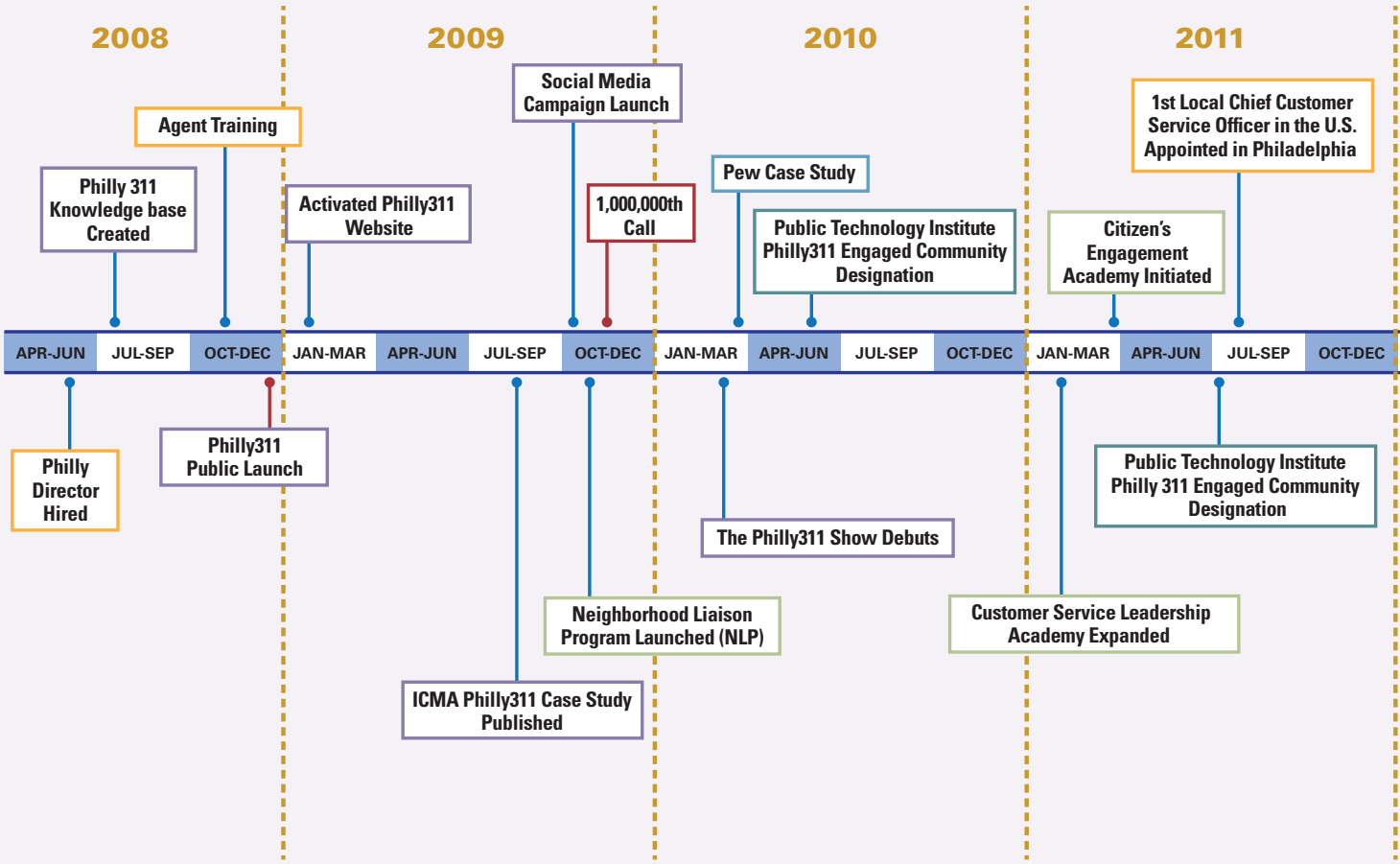
Philly311's traffic volume steadily increased since the center first opened, receiving nearly 1.5 million contacts annually from citizens. Social media obtained a 138 percent increase in followers after Hurricane Sandy hit Philadelphia in 2012. This massive increase showed Philly311 the power of having a social media strategy in place, and how critical it is to have an outlet for residents to receive and place information during times of emergency.

Functionality of a New CRM

Before the end of 2012, Philly311 took its 5-millionth call. The popularity of the service demonstrates the tremendous benefit of the system for citizens, but it also created operational strain. A year earlier, in 2011, an independent gap analysis found that the current customer relationship management system did not have the capacity to maintain the growing service requirements for the city. City leaders made the decision to invest in new technology to keep pace with current demands and to position the city for future technology developments. Planning for the implementation of a new CRM began.

After months of strategic planning, the new CRM, a partnership with Salesforce and Unisys, ushered in a new era of city engagement. By December 2014,

Philly311


2008
2009
2010
2011
APR-JUN
JUL-SEP
OCT-DEC
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JUL-SEP
OCT-DEC
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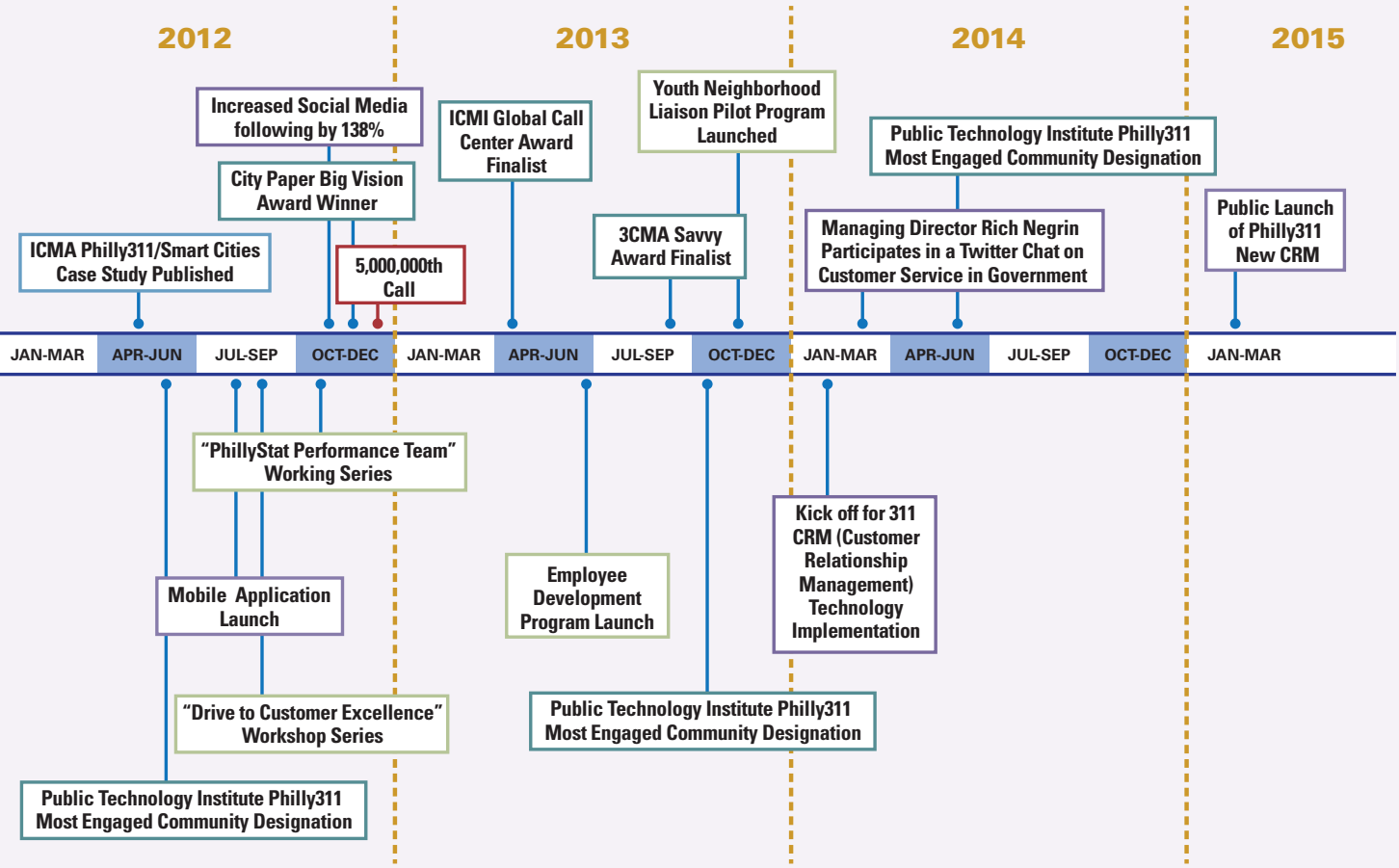
APR-JUN
JUL-SEP
OCT-DEC
JAN-MAR
APR-JUN
JUL-SEP
OCT-DEC
Philly Director Hired
Philly 311 Knowledge base Created
Agent Training
Philly311 Public Launch
Activated Philly311 Website
ICMA Philly311 Case Study Published
Social Media Campaign Launch
Neighborhood Liaison Program Launched (NLP)
1,000,000th Call
The Philly311 Show Debuts
Pew Case Study
Public Technology Institute Philly311 Engaged Community Designation
Customer Service Leadership Academy Expanded
Citizen's Engagement Academy Initiated
Public Technology Institute Philly 311 Engaged Community Designation
1st Local Chief Customer Service Officer in the U.S. Appointed in Philadelphia

TIMELINE


2012
2013
2014
2015
Increased Social Media following by 138%
City Paper Big Vision Award Winner
ICMA Philly311/Smart Cities Case Study Published
5,000,000th Call
ICMI Global Call Center Award Finalist
Youth Neighborhood Liaison Pilot Program Launched
3CMA Savvy Award Finalist
Public Technology Institute Philly311 Most Engaged Community Designation
Managing Director Rich Negrin Participates in a Twitter Chat on Customer Service in Government
Public Launch of Philly311 New CRM
JAN-MAR
APR-JUN
JUL-SEP
OCT-DEC
JAN-MAR
APR-JUN
JUL-SEP
OCT-DEC
JAN-MAR
APR-JUN
JUL-SEP
OCT-DEC
JAN-MAR
"PhillyStat Performance Team" Working Series
Mobile Application Launch
"Drive to Customer Excellence" Workshop Series
Public Technology Institute Philly311 Most Engaged Community Designation
Employee Development Program Launch
Public Technology Institute Philly311 Most Engaged Community Designation
Kick off for 311 CRM (Customer Relationship Management) Technology Implementation

Philly311 implemented a new, robust CRM system that integrates the city's knowledge base, service departments' work order systems, and community engagement programs to encompass one effective customer portal. The system improved the city's ability to share knowledge and work interdepartmentally, as well as offered social functionality. The system's robust infrastructure creates a social platform around the non-emergency contact center and facilitates conversations between neighbors and stakeholders who want to collaborate, share best practices, and organize events to improve their community. The new CRM allowed Philly311 to capitalize on a variety of communications, including social media data, to better understand the needs of the customers.

A Powerfully Connected City

The creation of Philly311 served as the flagship project for a centralized customer service plan for the city. The system has been widely embraced by Philadelphia residents. Since its inception, Philly311 has received an average of 98 percent satisfaction rate. Philly311's multiple platforms provide easy access for customers, embodying Mayor Nutter's fifth goal concerning delivering excellent and cost-effective services. The mobile app, which now accounts for 18 percent of Philly311's received requests, reflects the city's effort to integrate technology into city government. The app also received *City Paper*'s Big Vision Award in 2012 in the category of "Government and Politics" and was named a "Significant Achievement" in the Public Technology Institute's 2013 Technical Solution Awards. In the same year, Philly311 was an ICMI Global Call Center award finalist. Over 1,000 Philly311 neighborhood liaisons have been trained across the city. Philly311's data is shared through and used as the basis for the city's performance management system, PhillyStat.

In 2015, Philly311 became a finalist for the United Nations' Public Service Award, demonstrating the attention Philly311 pays to its international audience. The system has expanded its reach and has even become a resource and example for those outside of Philadelphia with thousands of social media followers. Philly311 continues to build toward an overall better and more reliable city government and truly embodies the ideas and efforts of a welcoming and connected city.

EMBRACING MOBILE CLOUD SOLUTIONS

"A truly connected government is citizen-centric and builds connections between citizens, employees, governments, and services... The city of Philadelphia has embraced mobile cloud solutions to transform its ability to connect with citizens while realizing operational and cost efficiencies for the benefit of its entire community."

—Ron Huddleston, senior vice president, global AppExchange and Partner Programs, Salesforce.com

2. Making the Case for Investing in Customer Service

In 1999 Baltimore, Maryland, was the first city in the United States to implement a 311 system. After witnessing the positive effects of Baltimore's call center, Chicago, New York, San Francisco, and other cities implemented similar 311 systems. Regardless of the city and those adapting the 311 models to meet their city's needs, the core purpose of a 311 call center remained to serve as a single point of connection for non-emergency municipal services and needs. For many cities, the evolution of the call center ended with the idea of a one-sided interaction. For city governments, the original 311 model emphasized the operational value over a customer-centric model. The formula was simple: a resident calls and the city provides information, but the model does not inherently include a customer focus.

Creating Higher Satisfaction and a Favorable Impression

Like other 311 centers, Philly311's strategy was to create a centralized contact point for non-emergencies, to have a reliable system with current information for citizens and departments, and to create a platform for interdepartmental communication. However, in alliance with Mayor Nutter's pledge for service excellence, Philly311 would focus on creating not only an efficient system but also a system that serves as a robust customer service center for city government. Philly311 was designed to lead the way in customer service—a fact enforced by hiring the first Chief Customer Service Officer, Rosetta Carrington Lue, and a priority that permeated through all aspects of city government. Local government's relationship with citizens is moving away from a traditionally pay to play system to one that is centered on transparency and communication. Both local government and citizens, then, become responsible for how interactions transpire.

For most citizens any interaction with local government, whether it is a licensing inspector or a police officer, shapes their attitude toward local government. A 2013 Pew Research Center survey reveals that 63 percent of citizens "say they have a favorable opinion of their local government."[3] Satisfaction with local government is at a significantly higher level than satisfaction with the federal government (24 percent),[4] and the stakes for local government are higher and more immediate.

Investment That Attracts More Residents, Visitors, Businesses

Citizens' trust and opinion of local government determine the future of a city. A responsive city, a city that prioritizes its citizens, views them as customers, and delivers exceptional customer service, is a city that attracts more residents, visitors, and businesses. Why does population growth help cities? According to Nobel Prize winner economist Gary Becker, "In modern knowledge-based economies, on balance population growth helps rather than hurts income growth and general welfare…Larger populations stimulate greater investments in knowledge that tend to raise per capita welfare."[5] Becker proposes that a city that attracts more citizens and dedicates itself to innovation is a city that has more prosperous citizens. Data from the Federal Reserve[6] support that opinion. *UrbanCincy* (UrbanCincy Media, LLC) observes from its data that "[higher] population density correlates with a neighborhood's likeliness to achieve high income growth."[7] When a city grows it attracts investors, companies, workers, and young people who create a larger domestic market, encourage an investment in knowledge, and create a greater local economy. Ultimately, a city that invests in customer service is a city that invests in itself.

Along with growth and public trust, the return on investment for jurisdictions is community support for budgets, zoning changes, and other municipal initiatives. Growth is directly observed in neighborhoods because citizens invest in their communities first. Whether it is a young couple looking to buy their first home, an entrepreneur deciding on the right site for his/her new business, or a senior citizen exploring where he/she wants to retire, residents make substantial investments, both financially and emotionally, in the community they select.

Residents and Businesses Thriving on Great Customer Service

Cities that actively manage service delivery and work to improve customer service experiences enable

residents to feel good about their investment in the community. Residents want to see their city and neighborhood as a safe, warm, and welcoming place for themselves, their families, and friends. Residents who feel good about where they live are more likely to engage with their neighbors, actively participate in community events, and support important community improvement projects. The more engaged residents are, the stronger a community will be in the long run.

A 2015 poll by Allstate/*National Journal* Heartland Monitor[8] shows that Americans hope to live in communities that have equal economic opportunities; with a 90 percent agreement from respondents. Often, those who provide opportunities are local entrepreneurs and businesses. Businesses and citizens consider similar factors when determining location. An article from the U.S Small Business Administration[9] outlines several tips for choosing a business location, including:

- Local labor market
- Safety
- Zoning regulations
- Taxes
- Minimum wage
- Government economic incentives.

Businesses, like citizens, are considering employment opportunities, crime rates, the safety of their employees, how their future location will be regulated, financial sustainability, and how they can partner with the community. What do all of these factors have in common? They involve the government's support, cooperation, and influence.

Great customer service is more than being polite; it defines the relationship between businesses and citizens with their government, and determines the prosperity of a city. Like an individual's experience with any customer service representative, if you do not feel connected and welcomed by the person on the other line, chances are that you will avoid working with the entity in the future. The same theory applies to cultivating the citizen's customer experience with its government, except it is not as easy to relocate when that experience is subpar. Investing in customer service, whether through programs, community outreach initiatives, courses, strategic goals, or vision, has a monumental impact on citizens' overall quality of life of and the livelihood of the city itself.

Calculating Return on Investment

Calculating the return on investment (ROI) from customer service is challenging. Will investing $10,000 in a customer service initiative yield $10,000 more in hard results? And, how can the government track the success of profitless customer service projects? It is easy to follow a dollar because money leaves tracks. Still, there are ways in which local government and the public sector in general have leveraged private practice metrics to better inform future projects and initiatives.

Nonprofits often face the challenge associated with ROI, but traditionally have used a different measure of value to reflect a more impact-centric formula for measuring ROI. Outcomes and values that can be monetized have defined ROI in the private sector, yet motivation, beliefs, and ethical practice are equally important and define value in the public sector. Regardless, the bottom line is that investment creates more investment.

According to a 2008 report from the ROI Institute[10] and comprehensive measurement and evaluation process data from more than 200 organizations, "Global trends in measurement and evaluation [indicate] increased focus is driven by clients and sponsors," and "ROI is the fastest growing metric." Increased focus from clients and sponsors is directly influenced by an organizations calculated return. Impact can easily be interchanged with the public sector's definition of value.

Results-Based Processes

The relationship between return and external financial support points to an across-the-board paradigm shift among all sectors. Activity is no longer sufficient evidence to justify activity. Activity—whether a program, project, initiative, or creation of a product–must be results based. This shift reveals the need to abandon ambiguous performance measurements, forge more social partnerships, and use efficient CRM systems that capture data. And with this paradigm shift, we see government adapting to results-based processes and valuing helpful data.

The City of Philadelphia has implemented a new CRM system to more efficiently collect more accurate city data. With the system, Philly311 agents are able to process more service requests with fewer mistakes due to smart technology, such as auto-complete and predetermined answers on drop-down menus. These new features reduce human error and make it easier for agents to collect and process needed data. The city's investment in the Philly311 mobile app, likewise, enables citizens to input data directly into the CRM system. Additionally, all customer-service-related data

are now in a central location, allowing the city to easily track requests when needed. The system also generates new data based on input trends, such as:

- Volume of contacts made by the public
- Types of contacts made, for example, service vs. information requests
- Dropped or abandoned calls
- Wait time on calls
- Resolution of contact
- First call resolution/transfers
- Location/address-of-service request
- Errors and mistakes in data captured
- Duplication of service requests
- Complaints.

The return on investment with data can be measured in citizens aided. Having data readily available enables the city to respond quickly in times of crisis, providing needed information to city staff, citizens, and elected officials alike. During a severe thunderstorm in 2014, Philly311 captured data on downed trees and limbs throughout the city. Philly311 staff members were able to generate reports with the physical locations of downed trees, greatly aiding police in routing traffic away from danger zones and alerting citizens of potential safety hazards.

Customer Satisfaction Surveys

Local governments can use customer satisfaction surveys to generate customer and performance data. One of the most commonly used methods to develop customer and performance data is through customer satisfaction surveys. Customer satisfaction surveys provide a quantitative measure of customer service. The feedback from surveys benefits an organization in several ways. Surveys provide:

Feedback on how well you are serving your customers

- Feedback that indicates how happy your customer is with your service
- Information on where you are excelling and how you need to improve
- Insight into customer demographics.

Traditional customer satisfaction surveys measure customer service after the fact: Did the customer receive what he/she needed? Did he/she find the experience favorable or not? In contrast, efforts like a Mystery Shopper Program evaluate the process of delivering the service: Was the employee smiling, and did he or she have a positive attitude? Did he/she answer all the questions posed by the customer? Did he/she take the time to explain processes or procedures? Likewise, supervisors can monitor phone calls or review e-mails and other correspondence with citizens to assess the agent's manner and people skills used in working with the citizen.

Collecting quantitative data through surveys can also set performance standards for departments and organizations. For example, the executive management team might decide that all service departments need to receive an average score of 4.25 or higher on a five-point scale. If a department receives a score of less than that, then a customer service initiative could be undertaken in an attempt to secure a higher average score on the following year's survey. The results from the customer service initiative can be compared to determine the program's ROI.

An ROI Methodology

Collecting comparative data based on customer satisfaction surveys is just one of the ways that ROI is being quantified. Dr. Jack Phillips and Patricia Pulliam Phillips note in their review, "Using ROI to Demonstrate HR Value in the Public Sector: A Review of Best Practices,"[11] that ROI methodology is currently being used by the U.S. Department of Veterans Affairs, Australian Department of Defense, and a U.S. federal government agency to "demonstrate program success and impact of training on educational programs," "measure the impact of a new human resources information systems," and "measure the cost benefit of a master's degree program conducted on site by a prestigious government."

In "ROI in the Public Sector: Myths and Realities"[12] from the ROI Institute, Dr. Phillips outlines a sophisticated method for calculating ROI. He suggests a series of steps for ROI methodology:

1. Identify program benefits.
2. Convert benefits to monetary value.
3. Tabulate the fully-loaded costs of the program.
4. Identify intangible benefits.
5. Compare monetary benefits to costs.

3. Where to Start: Defining Your Local Government's Customer Service

Before excellent customer service can be delivered, the local government as an organization must define it. Members of the National 311 Executive Council, an industry group formed to establish policies and standards for the 311 community, convened online to discuss how customer service in the public sector differs from that in the private sector and what those differences mean for local governments wanting to develop a centralized customer service system. That online exchange is captured here:

Differences Between Private and Public Sector Customer Service

Lue

Rosetta Carrington Lue, Chief Customer Service Officer for the City of Philadelphia and Director of Philly 311 Customer Contact Center: ***What do you see as the primary differences between customer service in the public sector and the private sector?***

Morrisroe

Joseph Morrisroe, Executive Director, NYC 311: I spent 20 years in the private sector, and have been in the public sector for nine years now. I see two primary differences.

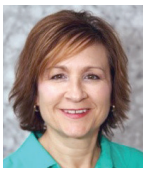
First, the concept of community comes into play in the public sector. Our customer service at NYC 311 is tied to and closely identifies with New York City communities and neighborhoods. Our team members live and work in the community they serve. As a result, they recognize that they are serving their families, friends, and neighbors. They understand the challenges and need for solutions, and every day, they have a real feeling of contribution.

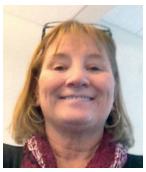
The second difference is the ability to focus on service in the public sector rather than sales. In the private sector, customer service is closely linked to revenue generation, customer retention, up-selling, and a growing share of the customer's wallet. Directly or indirectly that focus on sales and profit is a necessity. Competition is what spurs the private sector to new customer service standards and practices. In government, there is no revenue-generation pressure on the customer service operation. There is cost-efficiency, of course, but the focus is truly about serving and assisting the customer.

Lue: I agree, Joseph. Like NYC 311, Philly311 emphasizes community, and the value of that is definitely felt and seen in the community. I would say that because our return on investment affects quality of life, there is more pressure than that of a revenue-focused business. What are some of the other key differences?

Quintana

Janice Quintana, Director, CharMeck 311: In the private sector, they have more revenue, more bonuses, more perks. Their work is about retention of customers. In the public sector, customer service is a bit of a monopoly. When I first started working in the public sector, customer service wasn't considered particularly important. But in the last 15 years that perception has changed, and customer service is now considered a core competency by many cities and metro areas.




Left to right: Knight-Fields, Scheidegger, and Woods

Shelia Knight-Fields, Nick Scheidegger, and Deb Woods, Denver 311: Your customers are much more narrowly segmented in the private sector because they are calling primarily for one reason, whereas in the public sector, there are 100 different reasons a customer could be calling.

Also, customer service in the private sector is a source of revenue, helping to retain customers. In the public sector, we're primarily a source of information, but the public's expectation of customer service is still in line with what they receive in the private sector.

Unique Challenges of Public Sector Customer Service

Lue: ***Janice mentioned that customer service has become more of a priority for local governments. Do you find that there are greater challenges implementing a customer service initiative in the public sector versus the private sector? And if so, what are some of those challenges?***

Morrisroe: The financial arena is where I see the biggest challenge. Our team doesn't generate funds to

support its operation nor produce revenues. Maintaining a steady funding stream is a significant challenge in the public sector because we're discussing how to use public funds, taxpayer dollars. As such, we have a higher standard of accountability. The taxpayer is our client and deserves the best possible customer service, and the taxpayer is our funder and deserves the most cost-efficient platform possible.

Allen

Lisa Allen, Director, Baltimore 311: Customer service initiatives are usually more effective when they are tied to incentives. In the private sector there are plenty of opportunities to engage sponsors for funding, but in the public sector soliciting sponsors is not only a challenge but may be considered a conflict of interest.

In the public sector you have to be more creative when rewarding great customer service. You also have to institute requirements that promote customer service in the performance expectations.

Quintana: Here again, I think money is one of the biggest differences between the private and public sectors. The public sector simply doesn't have the money for great technology the way that the private sector does. The private sector can go for cutting-edge, even bleeding-edge technology. They can take more challenges and incur more risks than the public sector. From a technology perspective, there are some real differences there. In the public sector, you can't give out employee bonuses or other perks. Budgets are scrutinized much more closely in the public sector, because governments need to be accountable for how public funds are spent.

It doesn't always have to be about money though. I think you can create an environment where employees have a sense of team pride. Longevity in a career is important to many people. The public sector has changed over time and it has a lot to offer. Many of our employees take a great deal of pride in serving their city, and they develop considerable knowledge about our local government and community over time. People really care and they want to give great customer service. Hiring the right people, those who have a strong desire to help people, also helps.

Lue: It is true; government does not have the funds that large companies may have. However, as we work to make technology a priority, there is room for collaboration. There are technology companies out there that are willing to partner with cities. So yes, resources are always going to be an issue when it comes to implementing new technology, but there are creative approaches out there.

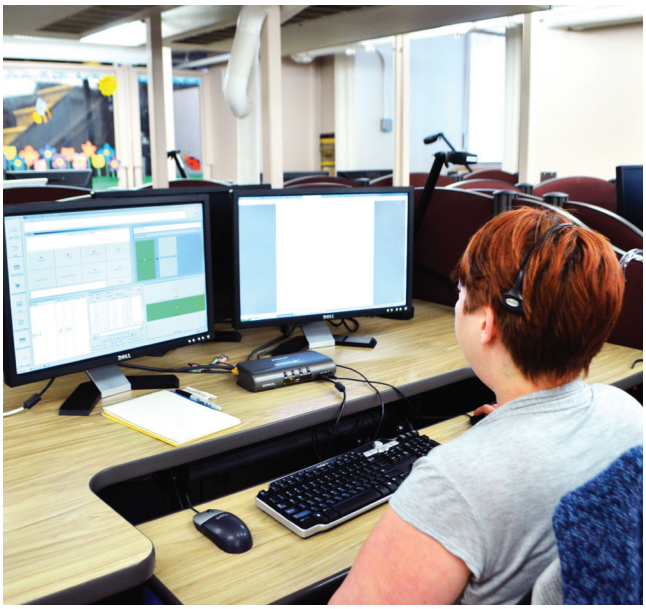
Knight-Fields, Scheidegger, and Woods: We had to work to secure buy-in from our agencies and departments to help them understand the value of what we do. We're all in this to address the needs of our citizens. The tasks our agencies and departments do are ultimately about serving our customers.

The private sector has more flexibility in responding to and satisfying the customer. Local government has some intense processes that need to be followed for some tasks. It's difficult to tell people no. What we've tried to do is emphasize the things that we can do to help.

Stereotypes and Misconceptions

Lue: ***In an effort to help understand the value of what we do, do you feel there are stereotypes or misconceptions that exist about public employees and their attention to customers? How do you overcome those when working with the public?***

Morrisroe: Yes, of course, but that's changing. The growth of 311 centers being implemented around the country is one factor. 311 centers have made and will continue to make customer service a core competency for local governments. Local government employees are no longer working exclusively for the Department of XYZ, and occasionally answering the phone. Cities now employ customer service professionals whose job is to provide an excellent customer service experience for residents.



Technology has also helped to change misconceptions. Advances in just the last few years—from smartphone applications to social media to open data—have made it possible for every town, city, county, and state to be far more accessible. That, in turn, supports the development of a strong customer service culture. Excellence in customer service is expected now.

Allen: In the public sector, employees are more resistant to change. It's not unusual for more seasoned employees in the public sector to want to work in their own personal "silos." They don't necessarily think about how to collaborate with other agencies to yield better results. You have to help expand their thinking to see the bigger picture and communicate how excellent customer service (311) needs excellent service delivery (agencies) to create an excellent customer experience.

Customer service representatives can go above and beyond working with the customer on the telephone, but if our departments don't get the work done, customers are not satisfied and the customer's perception is that the entire experience failed.

Lue: You hit the nail on the head: You need both customer service and service delivery to create an excellent customer service experience for our citizens. We can have the best customer service, but if there is no service delivery, customers' needs are not being met. On the other hand, one of Philly311's misconceptions about service is that we are also delivering the service we are assisting our customers with. Philly311, like a lot of city call centers, operates as a connecter to city departments, information, and services. It is our job to have the most relevant information from those departments, but we are not fixing pot holes or covering graffiti. Even if customers have had a great conversation with us, the status of their request often informs the way that they interact with our agents. ***Shelia, you are new to your position, what are your thoughts about stereotypes and misconceptions?***

Knight-Fields: I asked a lot of questions of friends and colleagues about that topic before taking the job. Stereotypes of city government employees still exist, namely that they have 100 percent job security and don't really have to work. But we work hard to demonstrate the value of what we do and what we can do. I believe our words, demonstrated by our actions, speak to the commitment and resolve we have to provide our constituents with the best possible customer service.

Orienting Employees to Customer Service

Lue: ***What types of education efforts have you implemented to help your jurisdiction's employees understand the role of customer service in day-to-day operations?***

Morrisroe: My team and I are always talking about the importance of customer service to our residents, and therefore, their own importance. We work hard to provide constant and consistent reinforcement of the importance of 311 and customer service.

From training to coaching to developing to recognition, we work hard to get that message across. And we partner with our city's leadership, administration, and agencies to ensure we all are advancing strong communication, sharing of information, and building relationships.

In the end, we promote, promote, and promote the brand. We want our employees to be proud of what they do and proud of where they work. We are always looking for ways to make sure the hard work of the women and men of NYC 311 is highlighted.

Allen: We constantly remind our employees how important their work and contributions are. We celebrate compliments when we receive them from our customers. We refer to them as "Yeah" calls. We appreciate and take these calls very seriously because people always call to tell you when they are dissatisfied but are not as motivated to let you know when something is done well. Positive calls from citizens saying you did something right are precious. The "Yeah" calls are important for morale. The supervisors design great certificates with the customer's comments regarding the agent and e-mail the certificate to everyone in the call center. Everyone has the opportunity to e-mail congratulatory comments back to the agent, which encourages peer recognition. We don't have extra funds to award bonuses for outstanding performance, but we can be creative and share the good news when we receive it.

Quintana: When we hire people, we have an orientation for them in which we talk a lot about customer service and our philosophy of what constitutes great customer service. We let people know what the expectations are, and remind them that the people they talk to may be their neighbors or someone just living a block down from them. All of our calls are public record, so it's important to always be "on" when you pick up the phone or respond to an e-mail.

We support both the city and county, so collaboration is very important. That's why we created a Partner Liaison Team to meet monthly with the departments we serve. During the meetings, we go over data reports together, discuss how processes are working, and explore if those processes can be improved.

Knight-Fields, Scheidegger, and Woods: Outreach is very important to us. We routinely go out to meet face-to-face with our constituents. We recognize that Denver 311 is the face of the city to most citizens, and we are the face of Denver 311. Customer service training is a staple for us, and much of our training has been picked up by other agencies. For example, one of our workshops, "Building Bridges," ended up being used by 10-12 agencies and departments within the city and county.

Compelling 311 Stories

Lue: ***What is your favorite customer service story at your current position?***

Morrisroe: A few years back, a hurricane hit the city. NYC 311 remained opened and received six times the average call volume of a normal day. When city buses and the subway system had to shut down, we had to find a way to get our employees into work.

We partnered with another city agency to secure buses, and whipped up a dispatch and pick-up route on the fly to transport our team members. It was powerful seeing those buses rolling in with 311 employees—frontline and staff support—putting the public need ahead of their personal needs.

In spite of the difficult circumstances, we had fewer absences that day than on an average day, and we responded to the city's need. It really showed the spirit of customer commitment of New York City311 employees.

Lue: Great story! Philly311 had a similar experience with Hurricane Sandy. Our social media followers doubled, emphasizing the need to further our customer experience on all social platforms. For Philly311, it really showed us that we could reach people who may have had their power turned off or who experienced other obstacles.

Allen: When we first opened our 311 call center in Baltimore, we were working with a "blended" workforce of employees from different agencies working under very different rules and values. As a result, it was very difficult to implement scheduling and attendance rules that make a call center successful. For example, many employees were use to "closing the shop" at lunch so everyone could celebrate another employees' birthday or other events. In an effort to provide excellent customer service, one of our goals was to always be available for our customers.

It was a positive turn when the light bulb went on and our customer service representatives began to understand how important it was to adhere to schedules and organized breaks. We weren't enforcing the rules and creating schedules to be mean, but to ensure we were being as responsive to our customers as possible.

Quintana: A few years back, a journalist/sports writer was in town for a Panthers game. After eating his lunch, he took the tray to a nearby trash can and pitched the leftover garbage. The next day when he got up, he realized that he'd also thrown away the keys to his rental car. All of this was on a Sunday.

He went back to the trash can and called 311. Our call taker called the solid waste service staff. Fortunately, solid waste had a crew downtown working clean-up after the game. They came over and opened up the trash can where they found the keys. He wrote a story afterward and Tweeted about it.

Knight-Fields, Scheidegger, and Woods: One of our representatives took a phone call from a woman who happened to be disabled. Denver has a high grass and weeds ordinance, and this woman had begun to receive notices from the city, and her landlord was threatening eviction if she didn't take care of the property. Through the course of the conversation, the rep-

resentative developed a bit of a bond with the caller.

The agent took a bit more information, and after talking it over with the staff in our center, she decided to go over to the property and mowed the woman's yard for her. That act of kindness not only told me much about the character of our representative, but was a powerful reminder to all of us that we are humans first and foremost, and sometimes it's good to go above and beyond our normal work duties.

Advice for Colleagues

Lue: ***What advice would you give a colleague or peer in another city charged with establishing a new customer initiative in his/her city?***

Morrisroe: Come learn from the best, and visit NYC 311!

Allen: Make sure you have the support and a clear mission from the very top. When Baltimore first decided to move toward a one-call center, the mission and goals were communicated straight from city hall. City hall has remained supportive and confident that the "One Call to City Hall" (311) has proven to be successful and customer friendly. 311 also monitors workflow processes and promotes accountability. Share and use the data gathered from 311 to promote more effective practices.

Quintana: Be patient, and make sure you have support from the very top of your organization. Anybody starting a center has a lot of resources available because most of the major cities in the U.S. and Canada have 311 centers now. Reach out to them to learn about their best practices as well as their mistakes. I would also suggest you reach out to all the key stakeholders in your organization to talk to them about the benefits of starting a 311 center. They will have lots of data to share.

Having the right technology is important. Here in Charlotte, we opened our 311 center and operated for about 10 years without the type of customer relationship system we needed. We're in the process of implementing the type of system we need now, but there are a lot of layers to contend with. Starting with the right technology from the beginning would have resulted in cost savings and greater efficiency in the end.

Knight-Fields, Scheidegger, and Woods: Building a customer service system is a citywide initiative. It requires a bigger vision and coordinated marketing to help agencies and departments as well as constituents understand the long-term benefits.

We love customer service, and have a passionate group of people who truly care for our city. People do care. That fact has upped our objectives for the center and what we intend to accomplish.

Lue: I couldn't have said it any better. There are a lot of factors that need to be considered when starting a 311, but as anyone can see from our experiences, a customer centric 311 is an important resource for any city. However, having a concrete vision and mission and having support from your administration is a requirement. When Philly311 began to build in 2008, we did not have the technology that we do today, nor were there as many cities with 311 systems. That is not the circumstance today, and the 311 National Executive Council is a testament to those efforts.

4. Steps for Delivering Stellar Customer Service

What does it take to improve customer service? No single path leads to great customer service. Every city and county is different, as is their definition of excellent service. Creating a thoroughly satisfying experience for community residents starts with vision and strategy and requires the development of a supporting culture, a plan to promote the customer service value, and a system for measuring customer service.

Vision

Local government leaders need to be clear about the customer service experience the city it is trying to deliver. Every community is different, and how customer service is defined by that community is equally different. For example, is it important that the customer feels that he/she received *complete information*? It's easy to refer people to a website for information, but taking the time to explain nuisances in rules or regulations will provide residents with a sense of confidence that they know what steps they need to take. Other city leaders may decide that they want customers to be impressed with the accuracy and speed of the service. For many people, making a trip to city hall can feel a bit overwhelming. Providing a *welcoming environment* and a sense that citizens are valued leaves a positive feeling with residents. A city may choose to strive for any or all of these experiences, or may set other priorities that meet their definition of excellence in customer service.

SMART GOVERNMENT

"I think we are starting to see a shift away from the discussion of big government versus small government and into a conversation about smart government through solutions like this."

—Vivek Kundra, Executive Vice President of Salesforce and former Chief Information Officer for President Barack Obama

Strategy

A clear vision of the desired customer service experience will drive strategy decisions for delivering that kind of service. Using 24/7 access as a priority, one strategy might be the development of a dynamic website that pushes new information out routinely. The development of online forms and other tools that enable a resident to send or receive needed information would be appropriate. Adoption of a mobile app that can be used anytime is another viable strategy. The use of an interactive voice response (IVR) system to record service requests over the phone might be another strategy to adopt. Any one of these strategies, or a combination of several, would serve to promote greater access to local government around the clock.

Gap Analysis

The delivery of excellent customer service requires a careful examination of how the jurisdiction does business with its residents currently. A gap analysis is helpful in comparing the current state of the customer service experience to where you want the desired experience to be. This requires an analysis of how the organization does business and where interactions with customers take place. Whenever possible, you would design those processes and procedures with the customer in mind.

For example, the permitting office might implement unified scheduling to enable homeowners or contractors to schedule required site visits at the same time. Or, the office might adjust front desk hours to open early and close late to give residents greater access to municipal services.

Supportive Culture

People tend to imitate what they see others doing within an organization. Fostering a strong customer service culture begins with leaders who believe in and exemplify how they want customers treated. If leaders are not talking about customer service regularly with staff and making their expectations for customer service clear, a customer service culture will not evolve in that organization. Seeing how a leader responds to residents when they have a concern or problem sets the tone for the whole organization.

For leaders sincerely devoted to creating a customer service culture committed to excellence, Shaw and Ivens[13] detail a process called *Culture Mapping.*™ The

steps include:

- **Defined.** The desired culture for the organization must be discussed and a definition agreed upon of what actions and behaviors constitute excellent customer service.
- **Designed.** The infrastructure of the organization needs to be developed to support the desired culture. Communication within the organization is particularly important. Are departments sharing information back and forth? Do employees have the resources they need to respond when residents need help?
- **Aligned.** Once the organization has determined what excellent customer service represents, staff members look at processes and procedures to make sure they support an excellent customer service experience.
- **Signed.** Leaders must show the way and need to sign on with their support.
- **Mine.** Everyone in the organization needs to own the new culture and contribute to it.

A Plan

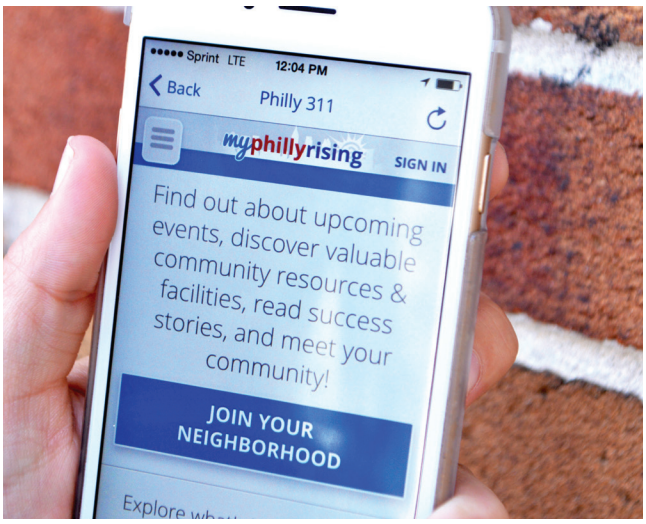
The development of a local government customer service plan can be a modest or substantial undertaking depending on the jurisdiction's customer service goals. Some tools, such as establishing a customer service policy that must be read and signed by all employees, will involve mostly staff time. Other tools, such as a centralized customer service system (for example, a 311 contact center), require a substantial investment and rethinking of how business will be done within the organization.

Developing a plan for customer service begins with a vision for what kind of customer service experience the organization wants to create for its residents. For some, that might be to deliver world-class customer service using the most current technology available. Other jurisdictions might desire to make everyone feel welcome and comfortable whenever they come to city hall to do business. Appropriate programs, training opportunities, feedback mechanisms, and other tools can all be developed once a vision has been clearly established.

A System for Performance Metrics

Customer service is very much about the experience a customer has when coming in contact with the jurisdiction, which can be difficult to quantify. In the private sector, business leaders find it difficult to link customer service results, such as customer satisfaction, with such management metrics as revenue, profit, and market share. In the public sector, this challenge is even greater. If customer satisfaction with a local government is low, will that affect voter turnout in an election? If customer satisfaction is high, will negative social media comments be reduced? There is not always a direct correlation between customer satisfaction and improved efficiencies or cost savings. Despite such difficulties, tracking performance metrics over time does offer evidence on whether customer service itself is improving, staying the same, or lagging a bit.

Bruce Temkin from the Temkin Group[14] recommends four areas to monitor as part of customer service metrics: behaviors, attitudes, perceptions, and interactions. Examples of possible metrics for these areas include staff notes from neighborhood meetings and citizen complaints that yield clues on behaviors. Social media can help compile information about attitudes and what people think about proposed local government initiatives. Perceptions might be measured through annual customer satisfaction surveys undertaken by the city or through citizen focus groups.



Selected performance metrics should involve easy-to-capture data and not be overly complex.

It's important to recognize that use of customer service metrics is a learning process. A city should begin with a core set of performance metrics and commit to using those same metrics for a set period of time in order to evaluate their effectiveness. A review after six months or a year may indicate that some customer service metrics adopted early on may need to be adjusted or even dropped. Effective metrics will yield insights that generate actions and new ways of doing business.

Selected metrics should also reach across the omnichannel customer service experience. Customer service is not delivered simply in person or over the phone anymore. E-mails, texts, websites, mobile apps, and social media such as Facebook and Twitter are among the communication channels residents use to connect with their city. Cities need to measure metrics across as many channels as feasible.

WE ARE ALL IN THE SERVICE INDUSTRY

Rosetta Carrington Lue joined the City of Philadelphia in 2008 in the midst of big plans for introducing the first full-service customer contact center to the city. According to Lue, "We are all in the service industry…It's no longer acceptable for government to say, 'Too bad. It is what it is. Don't ask any questions.' Government is stepping up to the plate and they are coming quickly. We can't go back."

5. Examples of Community Engagement Programs

Customer service and community engagement are closely related. Here we share examples of customer service programs designed to encourage greater citizen and community engagement.

311 CONNECTS US

"311 really gets people involved! It's actually a good community engagement organization. It gets businesses together to clean up their area. It helps [connect people] with the police, fire, and the Department of Licenses and Inspections."

—Barbara Kelley, of the Point Breeze Community Development Corporation

CharMeck 311 (CM311), North Carolina—An Evolution in Service Delivery Excellence

Traditionally, 311 centers throughout the country receive the bulk of their calls for solid waste service, public works, or transportation. CharMeck 311 (CM311) is unique because its largest call driver is for service or information for Charlotte Water (CLT Water), constituting over 35 percent of the annual contacts to CM311. CLT Water is the largest water service utility in the Carolinas. Primary resident service is provided by CM311 customer service representatives (CSRs). All resident service, billing, and information requests are now handled solely by CM311.

CM311 is one of the first 311 centers in the country to be the primary service provider for all water utility calls. Significant effort was put into data analytics to identify the most effective options for service transactions with citizens. Ongoing review of customer interaction data led to:

- creation of an escalation review team to review extremely complex billing or account issues
- design and re-design of a natural speech recognition self-service interactive voice response system (IVR)
- implementation of an automated outbound courtesy call program to remind delinquent customers
- development of a citizen web portal providing web-based access to account and billing information
- expansion of payment options for customers
- establishment of a comprehensive quality assurance and customer satisfaction measurement program.

Since all customer contact originated in CM311, a cost was already allocated to that interaction. Transferring a call to the CLT Water billing department delayed service delivery and frustrated customers. By eliminating the need for a transfer, the overall customer service level increased, the abandon rate and call cost decreased, and first-call resolution and customer satisfaction rose dramatically. Now less than 1 percent of customers are transferred, down from more than 30 percent. The customer service number on the billing statements, website, and other materials was changed to instruct customers to call CM311, reinforcing to the community to call CM311 first for any non-emergency issue. Results include:

- Annual call volume reduced 40 percent (187,000 fewer calls annually)
- Annual cost reduction opportunity: $1,000,000 (@ $5.50 per call)
- First-call resolution increased: 68 percent to 99+ percent
- Speed to answer reduced: 81 seconds to 30 seconds per call
- Accuracy rate of 99.5 percent (60,000 annually) when residents move in and out of living quarters
- Customer complaint reductions.

This process has been in place since 2010 with solid data and measurable improvements.

The effort provided a solid foundation from which other strategic initiatives will and have launched, such as the IVR, customer web portal, and courtesy call program noted above. The focus is to be a more proactive, data-driven environment and move away from being reactive to events or crises, real or perceived, that may emerge. Customer service delivery by its nature tends to be reactive, and has to be nimble enough to be that when needed. However, frequent communication and an emphasis on analytics and

process have helped to establish a more efficient level of service delivery.

Innovation does not have to be complex, technology driven, or expensive. Sometimes the best results are achieved by looking at an existing process, adding a team of dedicated individuals, and creating a team that is passionate about serving their customers better. From the customer's perspective, the way to request service did not really change, only the results—more consistent, effective, and efficient servicing—changed. Behind the scenes, the team laid the process bare, and reconstructed it in a way that made sense primarily from the customer point of view, but also in a way that maximized the talents and strengths of the respective departments involved. The work accomplished with the changes has created a strong relationship between CM311 and its largest partner CLT Water. The partnership has fostered an environment of continuous improvement, always looking for ways to better serve the customer and be conscientious stewards of the resources provided to the City of Charlotte and Mecklenburg County, North Carolina, residents.

For more information, contact CM311 at 704-336-7600.

Kansas City, Missouri 3-1-1 Action Center—Community Engagement University

The City of Kansas City worked with Dr. Alfred Ho, School of Public Affairs at the University of Kansas, on a project to analyze data from a variety of sources, such as 311 service requests, citizen survey results, and census data. Throughout the project, it became clear that often residents' dissatisfaction with city services was based on perception rather than reality. Using the results of this study along with data from the informational calls (approximately 65 percent of total call volume) received in the 311 Call Center, the City of Kansas City initiated several programs designed to help communicate, educate, and inform residents.

One of these programs is the Community Engagement University. This is a free, hands-on, interactive, program for Kansas City residents that covers the functions and operations of Kansas City municipal government. The program is offered in the spring and fall and consists of eight two-hour classes that meet once a week. Class size has increased with each session due to the demand, but in order to maintain the interactive, hands-on environment, the class is limited to 40 participants.

Community Engagement University courses are structured around the city council priorities rather than individual department operations. We also use annual citizen survey data to select the specific topics to cover. For example, Session Three, "We Keep This City Clean," highlights programs in the public works, parks and recreation, and water services departments. These same departments may also be included in other sessions such as "We Keep This City Healthy and Active" and "We Build and Improve This City."

At the beginning of each class session, the applicable council priority is reviewed as well as the city's "KCStat Dashboard," which outlines the goals and measures for the priority and how well the city and the individual departments are performing on the priority. Applicable open data sets, such as 311 service requests, are also reviewed.

Not only do participants gain a better understanding of how our local government functions and how well we are performing, but they also learn how to stay informed and share the knowledge. They also learn about opportunities to volunteer, participate in projects, get involved in public affairs, build a sustainable neighborhood, provide feedback on services, and improve the quality of life in Kansas City.

University participants come from all areas of the city and often help "spread the word" with new programs and partnerships. A Kansas City librarian who graduated from the Community Engagement University asked the 311 Call Center to partner with the Kansas City Public Library system. Working together we added city services kiosks in the libraries and trained librarians in assisting customers with all online city services.

A local high school government teacher worked with us to design a curriculum she could use in her classroom after she completed the Community Engagement University. The *Government 101* curriculum was created to teach students how local government works and how they can be involved. The first class was held in March 2015 and was overwhelmingly successful. The students committed to volunteering their community service hours to the parks and recreation department (100 hours per student for graduation).

Input received from the most recent participants was used to completely revise the 311 Call Center's CRM coding system from "department speak" into "citizen speak." This also made 311 data reports appearing in the city's open data website more useful to residents. After participating in this class project, one class member volunteered the services of her company to redesign the city's open data website to improve the user experience. This class also selected the design for the new 311 mobile van, which debuted

in June (another tool for connecting customer service and citizen engagement).

The connections and relationships made in each class have created additional opportunities for city staff to partner with residents, neighborhoods, organizations, and businesses. Input and feedback received from each class is being used in city projects and plans, such as the Community Health Improvement Plan and the annual budget.

Over the last two years, the city's annual citizen survey has shown improvement in every category related to living and working in Kansas City, Missouri. Visit https://data.kcmo.org/ to see the results.

For more information, contact the Kansas City 3-1-1 Action Center at 816-513-1313.

MC311, Maryland—Spanish Language Promotion

Montgomery County, Maryland, has a significant Latino population, and its customer contact center, MC311, is promoted to Spanish-speaking residents in a variety of media throughout the year. Two spring and summer campaigns run radio spots on four to six Spanish-language radio stations in the local metropolitan District of Columbia market. We advertise in two Spanish-language newspapers and their websites during this time. Throughout the year, we have public service announcements on the *Montgomery Al Dia* radio program once per week, as well as posters placed in 50 county libraries and recreation centers. Last summer we also purchased bus shelter advertisements in Spanish. In addition to paid promotion, we have a community engagement team that provides outreach at community meetings and events. We always have at least one Spanish-speaking team member in attendance. We plan to attend more than 20 meetings in 2015.

Many Spanish-speaking Montgomery County residents were unaware of MC311 until we were able to speak to them in their native language. Many people don't know that MC311 employs a number of Spanish-speaking agents. Our program has extended the reach of our services as the number of calls to MC311 from Spanish-speaking residents has grown significantly as a result of the program. The program has run for about two years with data collection beginning in 2014.

We will look to partner our community engagement team with local community agencies and nonprofits to reach as many people as possible.

For more information, contact the MC311 at 240-777-0311.

San Antonio 311, Texas—Ambassador Program and Guided Tours

The City of San Antonio's Communications & Public Affairs Department designed a "311 Call Center Ambassador Program" to provide residents an opportunity to learn about city services facilitated through the 311 Call Center. The program invites neighborhood and community leaders to get an in-depth view of how the 311 Call Center operates. This includes a full briefing of process, integration, and partnership with various city departments for which we take calls, and a full tour of the call center.

The Ambassador Program was launched in September 2014 and is offered every other month. It has graduated 30 community members, helping citizens better understand how 311 works and the services and information available through the 311 Call Center. A side benefit has been that the program participants then ask for a presentation at their respective community meetings, which helps educate the residents about 311 Call Center services.

The 311 Call Center is located at the Emergency Operations Center at Brooks CityBase. The Ambassador Program requires attendance at a 1.5-hour class. All participants will get a tour of the Emergency Operations Center and receive hands-on knowledge of the city services facilitated through the 311 Call Center. Upon completion of the class, all participants receive a certificate. The class is held every other month or as requested by neighborhood organizations. As ambassadors, city residents serve as key individuals throughout the community, where they receive information regarding city services and assist the city in sharing information.

The 311 Call Center is also open for guided tours by appointment. It targets youth and neighborhood associations that want to better understand the 311 Call Center operations and services. Tours also provide an opportunity for elementary school students to further develop an understanding of local government services. Youth clubs including the Girl Scouts and Boy Scouts are also invited for tours in an effort to assist with civic knowledge requirements.

For more information, contact the City of San Antonio at 210-276-8904.

My Spokane, Washington — Parks Registration Program

My Spokane formed in 2013 to centralize customer service for the City of Spokane, Washington. One of our first innovations was to take over parks registration for recreation classes in the summer. Before 2013, the parks department used a temporary employee to register approximately 8,000 citizens for parks and recreation classes annually. Often customers would have to leave a message and be called back. When My Spokane took over registration, customers no longer had to leave messages and were registered for classes at their convenience instead of the city's.

The city has benefited from this innovation by being able to eliminate the need to hire a temporary summer employee each year, and eliminate the overhead costs associated with hiring and training a new employee. Instead, trained agents who work in customer service handle registration calls in addition to other customer service calls. The availability of multiple agents to process calls also allows time to train customers on how to use the online registration program.

In the two years since the program's inception, the number of residents registering online has increased substantially, and customer wait times have been virtually eliminated.

For more information, contact My Spokane at 509-755-2489 or email myspokanecustomerservice@spokanecity.org.

6. How Philadelphia Is Building a Digitally Connected City

Communication technology has widely evolved since the 1990s. The U.S. Census Bureau[15] has collected data on computer use since 1984 and Internet access since 1997. It reports that in 2013 83.8 percent of U.S. households had a desktop or laptop computer, 63.6 percent had a handheld computer, and 74.4 percent of households reported having Internet access.

The Pew Research Center reports that Americans are increasingly using mobile technology in their daily lives. Beginning in 2014, Internet usage on smartphones and tablets outpaced desktop computers for the first time.[16] For many young Philadelphia residents, their smartphone is the primary means by which they access the Internet. With mobile technology so widely spread, local governments must consider how a government should deliver services in a digital age.

MOBILE TECHNOLOGY ABOUNDS

- The Pew Research Center reports on the use of mobile technology, finding that in the United States,
- 64% of adults own a smartphone (as of October 2014)
- 90% of American adults own a cell phone (as of January 2014)
- 32% of American adults own an e-reader (as of January 2014)
- 42% of American adults own a tablet computer (as of January 2014).[17]

A digital strategy or agenda for creating a connected community requires thinking beyond departmental missions and strict programmatic lines. Local government leaders and executives must consider how major technology systems will work with each other. Systems designed with interoperability, openness, and common standards from the outset enable new innovations. Philadelphia's new CRM directly addresses the questions and concerns of citizens using multiple communication channels, including an online community portal that enables neighbors to work on community projects together. PhillyRising, a program to address the needs of distressed neighborhoods, worked closely with Philly311 to test the new portal. The city's also-updated human resource management system accepts online job applications for the city.

Citizens use the full array of available channels to communicate with their local government. Effective communication is critical to providing quality customer service, but with so many communication channels in use, how can a local government respond effectively?

OMNICHANNEL COMMUNICATIONS

- Phone calls
- Web chats
- E-mail
- Text
- Instant messaging
- Mobile applications
- Social media (Facebook, Twitter, YouTube, Instagram, etc.)
- Phone self-service/interactive voice response (IVR)
- Web self-service/online forms
- Voicemail
- Voicemail to text
- Video conferencing

Shared Platforms

Managing multiple communication channels requires shared platforms that can integrate the different channels. For example, work order management systems in service departments should feed into the central CRM system so that agents can tell citizens if a service request has been addressed. Management of multiple social media sites and analysis of trends among those sites occur through social media management systems. Such systems enable scheduling Tweets or posting to Facebook and LinkedIn to provide citizens with information before they know they need it. The idea is to have the systems configured to work together.

The City of Philadelphia has adopted an innovation agenda that is wide ranging. Several of the key ele-

ments are described here.

Customer Relationship Management System

When the City of Philadelphia decided to invest in a new CRM system, special care was given to the development of a robust set of defined general and technical requirements for the new system. The city selected a system that contained several modules, allowing them to pick and choose which features were most critical. One in particular, the community portal, provides neighborhood and community groups several new tools for organizing events and communicating on relevant projects.

Cloud-Based Services

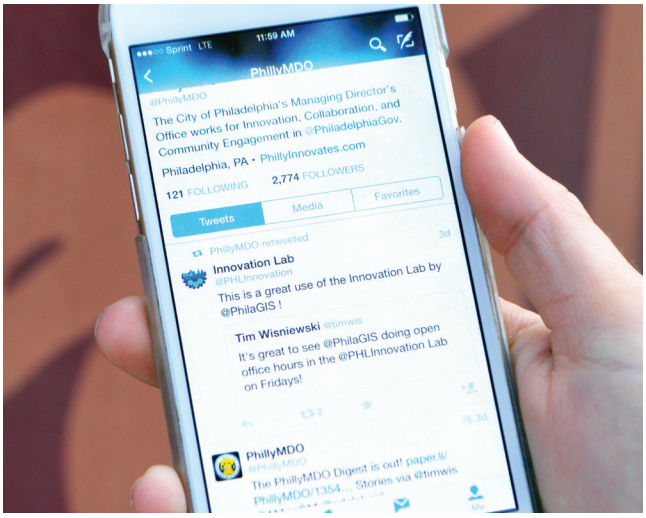
With so many software solutions and mobile apps emerging, many local governments are looking at cloud-based services as a way to keep pace with ever-changing technology. Traditional information technology support staff cannot afford to hire the requisite number of team members to manage and support all systems with on premise solutions. A cloud-based system operates more as a service than a product. For a service fee, the company provides online access, support, security, system upgrades, and other services. The city's new CRM is a cloud-based solution, and moving forward, it is expected that any new major systems purchased by the city will be cloud based.

Shared Platform

A shared platform, like a geographical information system (GIS), works with multiple software systems. Such a systems helps different departments work together to reduce costs, streamline development, apply consistent standards, and ensure consistency in how information is created and delivered. In the case of GIS, multiple data layers can be used or reworked for many different departments within a local government. In particular, Philadelphia's new CRM uses GIS technology to capture addresses and other location information to complete service requests and run reports by wards and neighborhoods. Since all GIS data is captured in a similar format, it can be used by other systems that are GIS compatible.

Social Media

Social media—Facebook, Twitter, YouTube, LinkedIn, and Flickr, among others—provides important two-way communication for sharing information. Monitoring the tone and tenure of postings made by citizens over time can help local governments be more proactive in pushing out the "right" information to the public. The City of Philadelphia maintains a very active social media presence in all of the major outlets



and responds to messages from specific individuals as appropriate. Philly311 agents are proactive about sending out program reminders and other information to the public via social media on a daily basis.

Interactive Voice Response (IVR)

Not everyone is a fan of IVR systems with the automated voices and confusing menus, and many local governments have adopted policies to have only live voices answering their phones. However, a well-designed IVR that uses simple responses to most-frequently-asked questions can relieve a backlog of calls from residents who want specific information. During weather emergencies, for example, IVRs can be used to update citizens on the location of shelters or evacuation routes or closed streets. They can also be used to announce event times for community festivals or

CITY OF PHILADELPHIA OPEN DATA STATISTICS: NUMBER OF UNIQUE DATA SETS BY YEAR

- Before 2008: 10 data sets such as city limits, railroads, etc.
- 2008-2012: 21 data sets such as council districts, trash pick-up days, etc.
- 2012: 43 Executive Order Established city's Open Data Policy
- 2013: 42
- 2014: 39
- 2015: 158 from 30 departments (every one listed on OpenDataPhilly.org)

provide deadlines for registering for recreation classes.

Open Data

All local governments collect, produce, and maintain a tremendous amount of data on a variety of topics. The concept of open data maintains that many of these data sets should be made easily available to the public for transparency and accountability purposes as well as for the purpose of increasing public participation in governance. Not all government data can be released to the public for privacy and security reasons. Advocates for open data believe that policies should be adopted that encourage local governments to be proactive about releasing data and presenting those data sets in an easily shared format that lets people easily manipulate the data for analysis and trend monitoring.

TOP OPEN DATA RELEASES FOR THE CITY OF PHILADELPHIA

- City budget (phila.gov/openbudget) (2015)
- Commercial building energy usage (2014)
- Professional services contracts (2014)
- Lobbyist activity (2014)
- Code enforcement violations (2014)
- Property assessments (2013)
- 311 service requests (2013)
- Bike network (2013)
- Part 1 crime incidents (2012)
- Building permits (2012)
- Business listings (2012)
- Property maintenance violations (2012)

In 2012, Mayor Nutter issued an executive order to establish an open data policy to increase access and enhance the transparency of city data sets. The order created the position of chief data officer (CDO) and established the Open Data Working Group, which focuses on enhancing internal transparency, accountability, participation, and collaboration through the open data policy and will develop the open government portal—the city's forum for public feedback. Following the establishment of the policy and assumption of duties by the CDO, Mayor Nutter appointed a Data Governance Advisory Board—consisting of nine members—to oversee the ongoing implementation of the open data policy.

Among the open data projects currently underway are new data releases for procurement contracts and five data sets from the city commissioner's office. The CDO has also begun a major data inventory audit so that the city can determine what data sets departments have and which sets the public might want available online. A catalog of every data set that exists in each department will be developed through the inventory. The public will have an opportunity to provide input on which data sets are of interest to them. This information will enable each department to prioritize data releases based on *measured* public demand.

KEYSPOT

The City of Philadelphia is committed to bridging the digital divide and bringing technology access to high-need neighborhoods. In the digital age, a computer and Internet access are a necessity, yet 41 percent of Philadelphians do not have access. Formed to tackle this problem, KEYSPOT represents a citywide coalition of community-based groups committed to bringing Internet access, training, and technology to all Philadelphia communities.

Innovation Lab

The Innovation Lab is a key piece of the City of Philadelphia's overall plan to build an infrastructure of innovation within municipal government. The Innovation Lab provides a space conducive to cross-departmental collaboration where the city's challenges can be studied and approached through new ways of thinking.

The lab is intended as a place for learning and accommodates individual use, cross-departmental co-working, and scheduled programming. Programming will take a number of forms, including topical research modules in areas such as GIS and spatial analysis, IT, public health, economic development, and arts and culture. The lab will also develop programming to enhance civic collaboration and engagement. External participants could include local technology start-ups, representatives from the open data community, youth affiliated with local nonprofits, and advocates for technology access. Further, the lab can be used as a training room and test site for new technology, processes, and programs to facilitate innovative thinking across Philadelphia.

What's Next?

Providing better customer service means knowing what is next for your customer. As communications adapt with new technology, so must those responsible for communicating municipal information. Being a leader in customer service means envisioning the future, and

finding innovative ways to apply new technology.

Electronic sensors have been embedded virtually everywhere, from roadways to stream banks. The data collected by these thousands upon thousands of devices enables complex data analysis that can be used to, for example, calm traffic or prepare for potential flooding conditions in a city.

A smartphone with GPS positioning, an automobile with a computer to monitor performance, or a farm animal with a locational microchip embedded in its skin. Any one of these "things" can be part of the emerging "Internet of things" as long as it has an IP address and can be transferred over a computer network. For local governments, the Internet of things may provide the ability to improve the maintenance of vehicles, increase energy efficiency based on where people are located in a building, or provide public health alerts to citizens based on changing weather conditions.

The future is local government customer service will be focused on integrating systems in order to create a connected community. Essentially a system of systems that ingrate technology will transform how the business of government is done. Making these new connections between software programs will result in greater citizen access and improved transparency. Less people power will be invested in collecting and generating data, and more time will be spent on analyzing what that data means in terms of improving our quality of life within the community.

While considering how new technology can change a citizen's life, we return to the question that is the staple of customer service: How can I better assist you? What would customer service in government look like if we fully applied smart technology like electronic sensors, microscope technology, and the internet of things? Many cities like Philadelphia are already implementing these ideas to create smarter and more connected cities. The possibilities are limitless, and the motivation is present in communities and neighborhoods across the nation.

7. Resources

Association of Government Contact Center Professionals (www.agccp.org)
The Association of Government Contact Center Professionals is a nonprofit organization created by government contact center professionals for the benefit of other government contact center professionals. Officially formed in 2003, the AGCCP has grown to include more than 40 member cities and counties throughout the U.S. and Canada. Members of the association meet annually to share best practices, explore new technology, network, and learn from each other's experiences. Although the membership is diverse in every way, members share a common dedication to improving their profession and supporting each other.

CS Week—311 Synergy Group (www.csweek.org/web/311)
The CS Week 311 Synergy Group provides a professional, unbiased environment for in-depth and ongoing discussion of current issues and common interests among current and prospective 311 customer contact managers throughout North America.

Data-Smart City Solutions at Ash Center, Harvard Kennedy School (www.datasmart.ash.harvard.edu)
Data-Smart City Solutions is working to catalyze adoption of data projects on the local government level by serving as a central resource for cities interested in this emerging field. It highlights best practices, top innovators, and promising case studies while also connecting leading industry, academic, and government officials. The research focus is the intersection of government and data, ranging from open data and predictive analytics to civic engagement technology. Data-Smart City Solutions seeks to promote the combination of integrated, cross-agency data with community data to better discover and preemptively address civic problems.

International City/County Management Association (www.icma.org/311assistance)
Through its 2006–2011 National Study of 311 and Customer Service Technology, ICMA has established itself as a key research organization and national thought leader on the benefits of centralized customer service systems for local governments. As part of the study, ICMA has, since 2006, worked with communities across the United States to identify leading practices in establishing 311/CRM systems.

National 311 Executive Council
Comprised of leaders of large urban 311 contact centers in the United States, the National 311 Executive Council works to raise the profile of 311 and the need for excellence in government customer service. The group focuses its activities primarily on policy and advocacy in order to create new benchmarking tools and standards for the field.

Public Technology Institute (www.pti.org)
Public Technology Institute actively supports local government executives and elected officials through research, education, executive-level consulting services, and national recognition programs. As the only technology organization created by and for cities and counties, PTI works with a core network of leading local officials—the PTI membership—to identify research opportunities, share solutions, recognize member achievements, and address the many technology issues that impact local government. In 2010, PTI created the Citizen-Engaged Communities designation, an annual program to recognize excellence in multi-channel contact centers and best practices for the use of citizen relationship/records management (CRM) systems, 311 services, web portal technology, telephony systems, and mobile communications infrastructure.

8. About the Authors

Rosetta Lue, Chief Customer Service Officer, City of Philadelphia

Ms. Lue is responsible for managing the implementation of the Customer Service Support Plan, the comprehensive, performance-based initiative aimed at refining customer service and responsiveness to better serve the people of Philadelphia and enhance the city government's cost efficiencies and functions. Her position is unique in municipal government in the United States. Lue also implemented and oversees the Philly311 contact center operations, the city's nationally recognized non-emergency contact center that delivers optimal customer service for 1.5 million residents, businesses, and visitors.

Under the direction of Richard Negrin, managing director for the City of Philadelphia, Lue and her team have spent the last year analyzing how the city's departments have operated historically, in order to develop plans based on concrete data, to ensure consistent, centralized objectives throughout the municipal government. Modeling the best practices of Fortune 500 companies as a methodology for creating a smoother operation, Lue was advised by prominent businesspersons from Philadelphia's Private Sector Outreach Board.

Lue has more than 15 years of hands-on experience in business operations and senior leadership in both the public and private sectors. She is recognized as an expert in customer experience management across diverse industries in both the private and public sectors, including domestic and international markets. Her focus has been on setting customer experience and brand strategy, implementing and operating core business processes and performance management, and leading extensive change management initiatives to drive optimal performance results.

Cory Fleming, Program Director-311/CRM Systems, International City/County Management Association

Ms. Fleming directs ICMA's customer service and 311/CRM systems work, leading workshops and providing contract services to local governments implementing centralized customer service systems. She served as the project director for the ICMA National Study of 311 and Customer Service Technology (www.icma.org/311) from 2006 to 2011. This national study, the first of its kind, resulted in a wealth of new research, resources, and tools for local governments that are implementing or maintaining a centralized customer service system.

Fleming has written about the use of data for improved local government service delivery and performance measurement in various capacities. She taught survey management for the George Washington University's Survey Design and Analysis Graduate Certificate Program from 2002 to 2004. Fleming served as the editor of *The GIS Guide for Local Government Officials*, a joint publication produced by Esri and ICMA in 2005. A subsequent joint publication, *The GIS Guide for Elected Officials*, was released by Esri Press in January 2014.

Fleming has an extensive background in community development, having worked with local governments, community groups, and nonprofit organizations on a variety of development issues for over a decade at the Iowa Department of Economic Development. Prior to joining ICMA, she conducted research on building capacity of nonprofit organizations while at the Center on Nonprofits and Philanthropy at the Urban Institute.

Amanda V. Wagner, Customer Service Programs and Engagement Strategist, City of Philadelphia

Ms. Wagner oversees the 311 Communication Strategy Unit (CSU) under the chief customer service officer and the managing director's office. In this role, Wagner maintains and expands 311's customer service programs in an effort to educate and promote awareness of the city among Philadelphia's citizens. Within the CSU, Wagner leads and oversees Philly311 TV, community engagement programs, the Customer Service Leader Academy, and the Customer Service Officers Program.

Wagner has vast experience working in city government prior to this position. She has held editorial roles for Drexel University's Center for Cultural Outreach, where she served as senior editor for Drexel's *Cultural Passport* and supported the online publications, *Table Matters* and *The Smart Set*. Wagner also has been a contributing journalist for philly.com, the *Daily News*, and VICE Media.

Final Thoughts about the City of Philadelphia's Customer Service Initiative

When Mayor Nutter asked me to return to public service in July 2010, as deputy mayor and managing director, I was both honored and excited to be part of his efforts to implement new policies that would improve the lives of all Philadelphians.

Philadelphia is a city of 1.5 million residents with a growing population and more businesses and visitors every year. The multitude of people we serve can make it a challenge to communicate with everyone and service each community's individual needs, so the city of Philadelphia has turned to technology to help us bridge the communication gap. By using technology to effectively communicate with our customers, organize their concerns by topic and location, and eventually predict and anticipate these issues, we will further establish Philadelphia as a smart, connected city.

To accomplish these goals, the city has worked hard to create supporting networks and facilitate communications with and across community organizations. Philly311's new customer service management solution's neighborhood portal, which acts as a social media for civic engagement, lets us better receive feedback from communities. Through programs, agencies, and facilities like the Neighborhood Liaison Program, Youth Engagement Program, Customer Service Leadership Academy, PhillyRising, the Center of Excellence, and the Innovation Lab, we are shifting government culture and creating a new era of citizen engagement.

We are constantly innovating, responding, and adapting our systems and operations to keep up with our citizens' technology demands. We have adopted a service-centered, citizen-focused approach. Creating a high-quality customer experience, from beginning to end, is important because interaction with government can have an impact on how someone views the effectiveness of local government. Combined with access to city services from mobile devices and real-time open data sharing policies, city government is seamlessly integrating and greatly improving efficiency. Philadelphia city government is participating in emerging technologies. We are involved in the conversation, testing new ideas, and taking strategic risks. We are staying on the cutting edge of technology to move us forward and improve quality-of-life issues for all Philadelphians.

Over the past eight years, Philadelphia has become one of the best cities in which to live, work, play, and raise a family. We want to make sure that it continues to be a vibrant city of great neighborhoods for all of us. With this primer we are able to share our journey to become a more service-centric, responsive, global, welcoming, and connected city. Our culture of innovation and our commitment to high-quality service are part of what makes Philadelphia a leader in the field of government citizen service and engagement.

I hope you have found the information in this primer useful and will bring some of the concepts from the Philadelphia experience and others to your own communities and cities as you work on creating a connected city.

In service,
Rich Negrin
Deputy Mayor and Managing Director,
City of Philadelphia

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