High Tech and High Touch: Connecting Citizens with Local Government

Recommendations from the ICMA National Study of 311 and Customer Service Technology

by Cory Fleming

Customer service. How to deliver it in an era of ever-tightening budgets is a question more local governments are asking. Local governments want and need to connect better with their citizens. The public's perception of whether government is working for them is critical in securing support for annual budgets, new initiatives, and a host of other local government efforts.

As a result, many local governments are exploring the feasibility of implementing centralized customer service systems, such as 311 call centers and citizen relationship management (CRM) systems, to more effectively and efficiently serve the public's needs. Technology combined with personal interaction seems to be a winning combination for bringing excellent customer service to citizens.

With funding from the Alfred P. Sloan Foundation in 2006, ICMA began work on the first-ever national study on 311 and related customer service technology used by local governments in the United States. The study explored the benefits and barriers to local governments adopting integrated systems for customer service. In addition to conducting a survey on local government customer service systems, the study produced a series of in-depth case studies—of San Antonio, Texas; Los Alamos County, New Mexico; Lynwood, California; Minneapolis, Minnesota; and Hampton, Virginia—

that highlighted key lessons learned by communities during system implementation.

ICMA researchers found a number of commonalities among the 311/CRM systems it studied that promote improved operations. These 20 study recommendations, which are listed in this article, can be used by other communities and jurisdictions as a basis for thinking through how they want their 311/CRM systems to operate, which elements or features they want to include with their system, and what the overall operating philosophy of the system will be.

Some of the recommendations are highlighted in greater detail in the box on page 18. For more information on all 20 study recommendations, see chapter two in ICMA's new reference manual, *Customer Service and 311/CRM Technology in Local Governments: Lessons on Connecting with Citizens,* available for free download on ICMA's Web site at icma.org/311.

Here are the 20 recommendations that can be used as a basis for thinking through how a 311/CRM system should operate:

SYSTEM FUNCTIONALITY AND MAJOR FEATURES

1. The 311/CRM system, when designed with the needs of the community in mind, provides citizens with an easy way to connect with their local government and offers a means to improve the effectiveness and efficiency of programs and services.
2. The foundation of a 311/CRM effort should be a strong desire on the part of local government leadership to make customer satisfaction a priority for their organization.
3. Local governments need to first define the goals and objectives of a 311/CRM initiative and then determine what level of investment is necessary for the required features.
4. Implementation of a 311/CRM system in the local government organization works best when done in planned phases, with each phase building on work done in earlier phases.
5. The new 311/CRM system should be viewed as an enterprise being undertaken by the whole local government organization, not a separate department unto itself.
6. To maximize the effectiveness of a 311/CRM initiative, the local government should undergo an extended self-evaluation and re-engineer its processes with an eye toward providing exceptional customer service.
7. Linking a CRM system to existing work order systems or using it as a work order system itself provides a direct connection between service request and service delivery.
8. Implementation of a 311/CRM system requires careful planning, including the development of scripts and protocols for responding to citizens' requests for information and service. A well-developed knowledge base with detailed information on local government services and programs should underlay the system.
9. An internal quality assurance program should be developed to measure and monitor contact center performance.
10. The 311/CRM system needs to be integrated into emergency management plans for the local government and be included as part of disaster response, especially during postdisaster information dissemination.
11. Assigning tracking numbers to service requests should be a standard practice in order to allow citizens to learn what action was taken to address their requests, as well as local governments to follow progress on the response and determine where bottlenecks or problems may exist in the delivery of services.

CITIZEN ENGAGEMENT AND PUBLIC OUTREACH

12. Multiple means for measuring how citizens view the performance of the contact center as well as local government departments need to be adopted.
13. Neighborhood associations and block clubs should be engaged to gather information about community needs as well as disseminate information on the 311/CRM system.

PERFORMANCE MEASUREMENT

14. Data collected from the 311/CRM system need to be integrated into a local government performance measurement program. In particular, service level agreements (SLAs) that define time frames for completion of services need to be established and monitored periodically.
15. Local government departments need to be trained on the use of 311/CRM data and how the data can assist them in the ongoing management of their resources.
16. The integration of 311/CRM data into a local government's geographical information system (GIS) technology is critical to understanding where and what type of service requests are being made in a community.

STAFF TRAINING

17. Contact center agents need to understand the day-to-day functions of different local government departments. Occasional site visits to see local government in operation will help agents better explain processes and procedures to citizens.
18. Knowledge is fluid. As government processes and procedures change, agents will need routine training through formal and informal means to keep up-to-date. Likewise, the central knowledge base should be updated regularly.
19. Diversity training should be mandatory for contact center agents in order to help them understand and be better prepared for dealing with residents of different cultural backgrounds.
20. Organizational and management support of contact center agents and their work is crucial for the

delivery of excellent customer service. Programs designed to recognize and reward employees for excellent work are needed.

COMING RESOURCES

ICMA's new reference manual on 311/CRM systems is just one of the many resources available to communities exploring centralized customer service systems. With additional support from the Alfred P. Sloan Foundation, ICMA has begun an expanded program of research to develop new tools for communities considering implementation of these systems. New projects will range from examining how 311 and 911 can best work together to provide emergency response, to measuring citizen satisfaction before and after the implementation of a 311/CRM system, to understanding the role of the system in encouraging citizen engagement.

The effort will include establishing an online discussion forum to bring together local government officials to discuss implementation and management issues related to 311/CRM systems. ICMA will also join Rutgers University's 311 Community of Practice and Public Technology Institute (PTI) to promote an emerging professional network for 311/CRM practitioners. **PM**

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A Few of the Examples Underpinning the Study Recommendations

Customer Satisfaction as a Priority (Finding 2)

ICMA's national survey on local government centralized customer service systems showed that 43 percent of local governments decided to implement such a system as the result of a strong desire to improve local government customer service. This commitment to customer service needs to be prevalent throughout a local government, not just within the 311 call center or department.

Several staff members from San Antonio's Customer Service/311 department observed that 311 does not really work for the citizens of San Antonio unless their service requests are addressed in a timely manner. The 311 staff, however, cannot actually go out and fill the potholes that citizens report to their center. All local government agencies and departments must be focused on customer service, have a desire to serve their community, and address problems in a prompt and timely manner.

Lynwood, California, a small community with a big desire to take advantage of technology solutions to enhance quality of life, did not originally set out to implement a CRM system. City leadership wanted to increase citizen access in the digital age, which led to rethinking the city's provision of basic services.

Pursuing the vision of having every residence wired with interactive cable caused the city to examine new means for delivering on the promise of the city manager's office " . . . [to] serve the citizens of Lynwood and strive to provide excellent service in an ethical, principled, responsive, and cost-effective manner."[1]

Self-Evaluation (Finding 6)

Establishing a 311/CRM system provides jurisdictions with an important opportunity to review and assess their processes and procedures in an in-depth manner, as they need to be documented and recorded in a central knowledge base for use by customer service agents in responding to citizen calls. This review process can also help establish reasonable service level agreements (SLAs), commitments by responding agencies and departments about how quickly they will respond to and resolve service requests.

The documentation and review process is time-consuming, but it can help identify duplication of effort, never-ending loops, and potential bottlenecks to achieving the goals of SLAs. One of the processes that Minneapolis, Minnesota, re-engineered was how the city handles graffiti complaints. Citizens frequently complained about the length of time it took for the city to address these complaints.

Under the original process, a complaint came in and the police filed a report. The police department registered the complaint and then sent it out to the appropriate police precinct. Then an officer of that precinct went to the site and photographed the graffiti for tracking purposes related to gang activity.

The police then sent the complaint to the department of public works for cleanup. Because graffiti itself is not generally a high priority in police work, a complaint often sat for two to three weeks before an officer was sent out to photograph the site.

After considerable discussion about the existing process and where efficiencies could be realized, the city decided to send graffiti complaints directly to the department of public works and provide its employees with digital cameras. Under the new process, when a complaint comes in, public works employees take pictures of the graffiti and forward the pictures to the appropriate police precinct. The department of public works quickly cleans up the site, drastically reducing the amount of time it takes to respond to graffiti complaints.[2]

Working with Neighborhood Associations (Finding 13)

In Lynwood, city staff members routinely attend neighborhood block

watch meetings that deal with a variety of quality-of-life issues. These meetings are an important source for staff to receive service requests and concerns from residents. Lynwood's neighborhood block watch specialist works with more than 50 block watch groups in the city network and serves as a backup to the customer service agent in the city manager's office. This hands-on, word-of-mouth approach to promoting the system is low cost and may be contributing to increased use of the system over time.[3]

Supporting Contact Center Staff (Finding 20)

The 311 systems are frequently described as providing a "front door" for local governments. If that is the case, then the call takers—customer service representatives or agents or whatever term is adopted for the frontline workers—are the individuals opening that front door. These employees give citizens an immediate impression of their local government and the values it holds. The people responding to citizens must be courteous, concerned, pleasant, knowledgeable, helpful, and demonstrate a willingness to address citizens' issues.

Citizens, however, are often unhappy or emotional when calling 311. Discussions can be intense and draining for call center employees, and job burnout is a real phenomenon for this type of position. Local governments can help prevent such burnout by offering a variety of reward and recognition programs.

Lynwood offers opportunities for professional development and training designed for its customer service personnel. These courses train staff about coping mechanisms and stress-reduction techniques. Lynwood also offers opportunities for peer networking and a break from the everyday routine.

Both San Antonio and Minneapolis offer their agents reward programs for outstanding performance. Rewards range from an extra 15 minutes at lunch, to grab-bag gifts such as free movie tickets, to employee potlucks and other similar incentives to make the work environment fun and enjoyable.

[1] "Mission Statement," City Manager's Office, Lynwood, California, www.lynwood.ca.us/cityDept/cityDept_manager.htm.

[2] "Minneapolis 311 System," fourth report in the *Call 311: Connecting Citizens with Local Government* case study series, ICMA, 2008.

[3] "Lynwood One Call City Hall," third report in the *Call 311: Connecting Citizens with Local Government* case study series, ICMA, 2008.