

Proactive Voice of the Customer Model

Using Customer Service Data to Improve Performance

ABSTRACT

Organizational Performance Management (OPM) is at the center of our organizational change, providing critical leadership and guidance to the organization on strategic and business planning, performance management, and enterprise wide process streamlining to improve operational effectiveness and efficiency. OPM deploys a range of strategic activities designed to analyze, measure and adjust aspects of individual and organizational performance through management controls, processes, and procedures of various types. At the start of FY2016, OPM deployed the Proactive Voice of the Customer Model as a data-driven approach to identify and even anticipate customer needs, address them in the most effective and efficient way, and to inform decisions around prioritizing maintenance and capital project funding. This structure promotes greater awareness, allows the organization to remain nimble, and enables a rapid response to emerging and changing needs and circumstances.

The Proactive Voice of the Customer Model allows us to *listen to our customers*, through thousands of data points coming in each month by way of the Customer Service Division. Targeted feedback from our annual Citizen Surveys, live Citizen/Stakeholder sessions, and various other *voice of the customer* initiatives and tools are also used throughout the organization to support voice of the customer initiatives. Using the information from Customer Service, the Performance Development Division (PDD), identifies trends, issues, and opportunities for improvement. Our Training & Development Division (T&D), along with the PDD, provides the solutions, specific process improvements, and standard operating procedures to address the issues. T&D and the Public Information Office (PIO) proactively educate and inform customers through numerous online and print tools and technologies.

Deployment of this model has resulted in a more customer-centric culture where we actively look to understand the needs of our customers through what they are telling us directly and indirectly with their feedback, questions, and concerns.

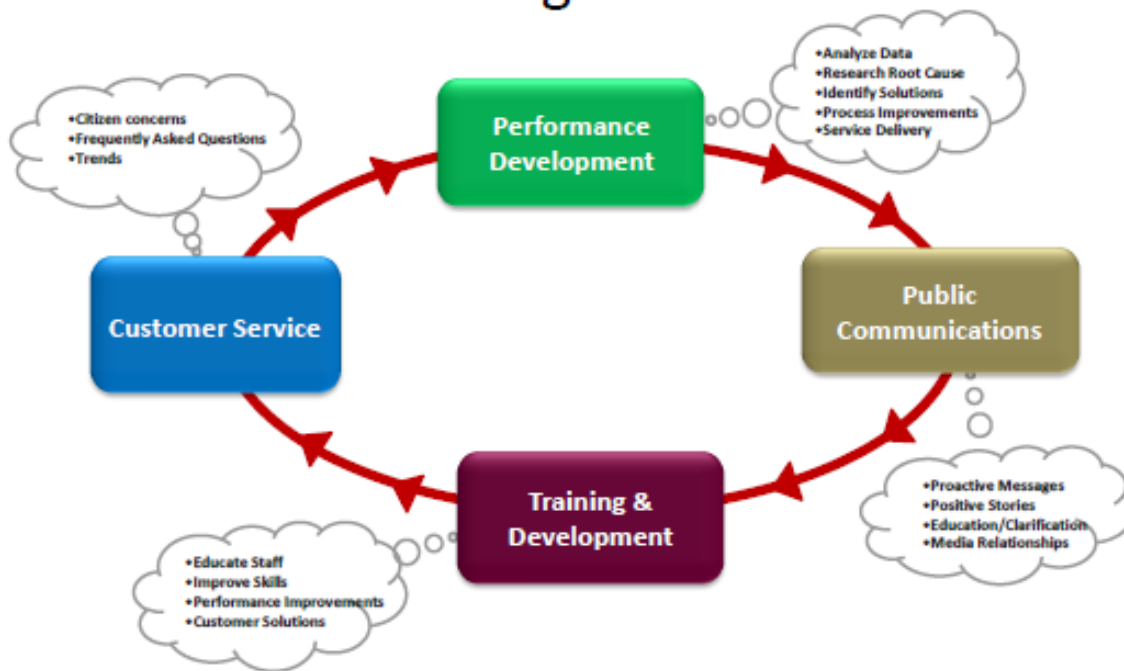
PROBLEM STATEMENT

For over thirty years, the culture of our organization was primarily reactive, responding to complaints and fixing things as they would break. In more prosperous economic times it was easier to simply throw money at the problem than it was to take the time to understand how to prevent it in the first place. But as the economic downturn, and in our State, certain legislation tightened our purse strings to the point of breaking, it became obvious that there would never again be enough money to simply fix things as they break. For us, the culture shift to a proactive approach would be 180 degrees, and would require a whole new way of doing business. The Proactive Voice of the Customer Model is a powerful tool in the toolbox where providing more with less is now a requirement.

PROGRAM DESCRIPTION

The revelation or sorts, surfaced by this program, is that we have a wealth of valuable customer data coming in every day through our Customer Service Division with over 15,000 phone calls and 5,000 walk-in customers on average each month. Historically, we have relied on the *lagging* performance indicators from our annual Citizen Surveys and our Citizen/Stakeholder sessions, when all along we had a great source of *leading* indicator data which, when properly analyzed, puts us in position to accurately identify needed actions and activities, to not only prevent problems before they become problems, but to steadily improve service delivery and customer satisfaction in the process. Success of the Proactive Voice of the Customer Model is measured primarily by reductions in call volume, requests, questions, or complaints regarding the specific issue. For illustration, we will use a specific example; the Animal Services Adoption Program.

Organizational Performance Management



Proactive Voice of the Customer Model

PROGRAM DESCRIPTION

ACTIVELY LISTENING to the CUSTOMER

For both walk-in customers and those calling by telephone, the process of categorizing and capturing the data is the same. The Customer Service Representative (CSR) listens to the question, request, feedback, or complaint. Through a series of clarifying questions, the CSR determines and verifies the issue, and applies the appropriate situation code. This code becomes a data point which forms the basis of the overall reporting. On a weekly basis, the cumulative reports are analyzed to identify issues or potential issues.

DATA ANALYSIS

Using the example of the Animal Services Adoption Program, the data indicates that the number of customer inquiries regarding *animal adoption* has increased by 20% in one month. The Customer Service Manager flags the issue and the Proactive Voice of the Customer Model goes into effect. A deeper dive into the data reveals three possible issues:

1. The process for adopting an animal is not being clearly communicated
2. The process itself is not working, lowering the rate of adoptions.
3. The staff at Animal Services are not correctly implementing the adoption process.

Since the County has committed to the *Save 90% (of the adoptable animals)* approach, having a simple to understand and experience process for animal adoption is critical. Any one of the above issues will negatively impact the outcomes. While historically, our approach to this was to handle each concern or complaint as an individual, unrelated event, we now use the cumulative data to identify trends and root cause. In this way we can solve the problem so that it does not return, as compared to having to solve the problem individually each time it comes up.

PROACTIVELY ADDRESS the ISSUE

The three possible issues are not mutually exclusive. It may be one, all three, or a combination to varying degrees. So far, experience has shown us that Deming was right when he said, "People don't fail, processes do". Most all of our processes, at least initially, represented *the way we had always done it*, and were in real need of improvement. So in this model, the Performance Development Division (PDD), is the first to jump in. Through a Rapid Improvement Event (RIE) or other initial assessment, the PDD identifies trends, issues, and opportunities for improvement. If warranted, the PDD maps, analyzes, and improves the process, complete with standard operating procedures (SOPs) to ensure consistent implementation. Performance measures are applied to ensure the intended outcomes are met.

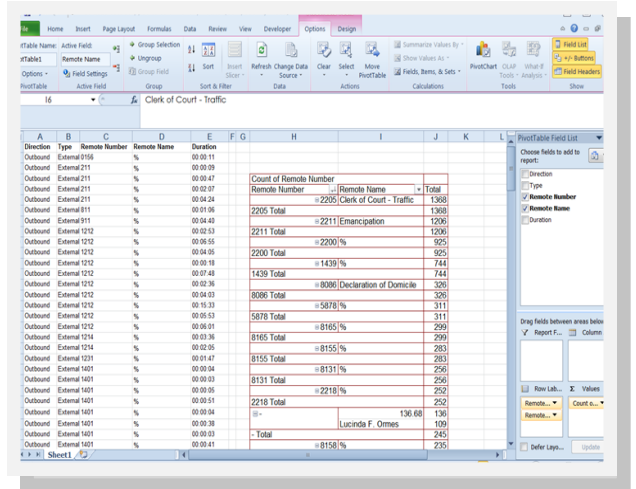
If the PDD verifies that the adoption process itself is optimized, our Training & Development Division (T&D), looks to see that staff has the proper level of skill, tools, and technology to effectively implement the process. If training solutions are required, T&D leads the effort.

In a number of cases, we have found that the process is good, staff knows how to implement it, but we haven't done a good job of communicating it to our customers. When this is an issue, the Public Information Office (PIO) proactively educates and informs customers through any number of online and print tools and technologies.

USE of TECHNOLOGY

Data from the Customer Service Reps is loaded into pivot tables which automatically sort, count, total or average the data stored in one spreadsheet. The summarized data is displayed in a second table.

Organizations may choose to deploy an off-the-shelf Customer Service or Performance Management software solution for tracking data. We are currently implementing a new ERP which will take on this data housing and reporting function in the near future. For now, Excel is just fine.



Direction	Type	Remote Number	Remote Name	Duration	Count of Remote Number	Remote Name	Total
Outbound	External	9156	%	00:00:11			
Outbound	External	211	%	00:00:09			
Outbound	External	211	%	00:00:47			
Outbound	External	211	%	00:02:07			
Outbound	External	211	%	00:04:24			
Outbound	External	811	%	00:01:06			
Outbound	External	911	%	00:04:43			
Outbound	External	1212	%	00:06:55			
Outbound	External	1312	%	00:04:05			
Outbound	External	1212	%	00:00:18			
Outbound	External	1212	%	00:07:48			
Outbound	External	1312	%	00:02:36			
Outbound	External	1212	%	00:04:03			
Outbound	External	1212	%	00:15:33			
Outbound	External	1312	%	00:05:53			
Outbound	External	1212	%	00:06:01			
Outbound	External	1214	%	00:03:36			
Outbound	External	1214	%	00:02:05			
Outbound	External	1211	%	00:01:47			
Outbound	External	1401	%	00:00:04			
Outbound	External	1401	%	00:00:03			
Outbound	External	1401	%	00:00:05			
Outbound	External	1401	%	00:00:51			
Outbound	External	1401	%	00:00:04			
Outbound	External	1401	%	00:00:38			
Outbound	External	1401	%	00:00:03			
Outbound	External	1401	%	00:00:41			
					2205 Total	=2205/Clerk of Court - Traffic	1368
					2211 Total	=2211/Emancipation	1206
					2200 Total	=2200/%	1206
					2200 Total	=2200/%	925
					1439 Total	=1439/%	744
					8086 Total	=8086/Declaration of Domicile	326
					5878 Total	=5878/%	311
					8165 Total	=8165/%	299
					8155 Total	=8155/%	283
					8131 Total	=8131/%	252
					2218 Total	=2218/%	252
					136.68		136
					109		109
					245		245
					235		235

PROGRAM COSTS

Outside of perhaps a technology investment to build the pivot tables, the cost of implementing the program can be expressed in the time it takes to train, prepare, and coach the Customer Service Representatives to accurately capture the situation codes for each transaction. The others key drivers of the model, Performance Development, Training & Development, and the Public Information Office simply do the work they would be otherwise doing in the organization, but with a more *on demand* sense of urgency.

RESULTS

Since this model was launched at the start of FY2016, we have validated its positive impact on operations. In our example of the Animal Services Adoption Program, we did find that the process itself, along with several other key processes in that department required improvement. For the four years prior, Animal Services had been under fire from activist groups and the media for not reaching the *save 90%* goal. A combination of improving the process, and ensuring the proper training for staff, enabled consistent performance at the 90% target level. A positive media campaign turned the tides with public opinion as well as with the press, taking away an unproductive distraction.

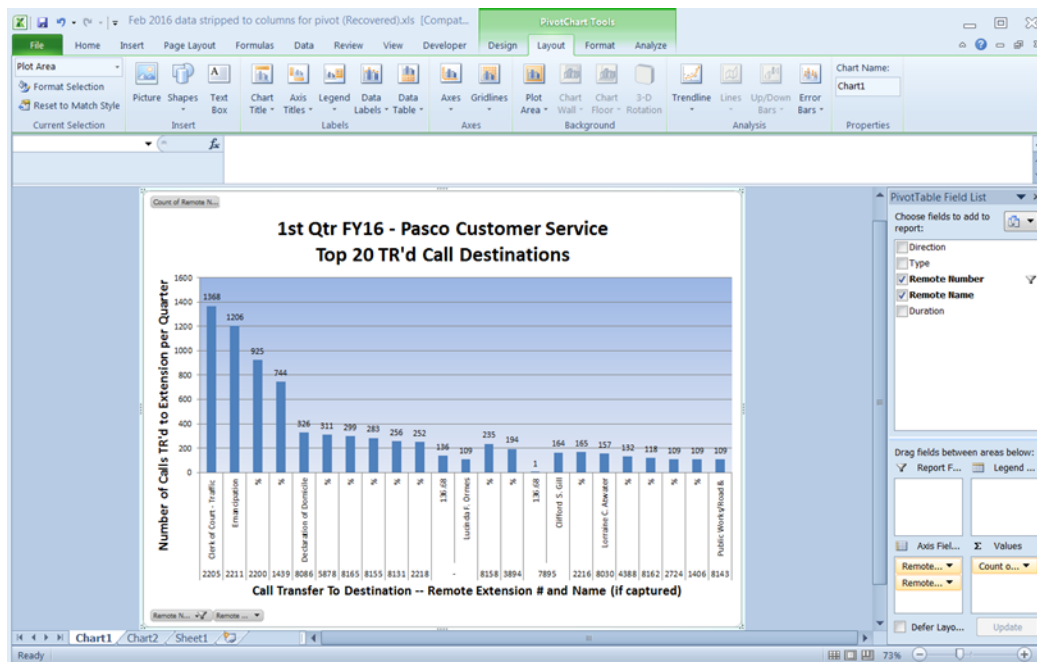
In another example, Customer Service regularly receives reports of pot hole in the roads, from which they will generate work orders for the Road & Bridge Department to affect the repair. Over 1,000 work orders are produced per month with half typically regarding road repair. By analyzing just the pot hole data, we can determine where road resurfacing is likely required. This then, makes better use of available resources, human, financial, and material, demonstrates an attentive response to our customers, and by prioritizing, can prevent more costly road repairs in the future.

In its most basic measure, the Proactive Voice of the Customer Model is successful when direct-effect customer satisfaction scores go up or the corresponding number of questions or concerns about the issue reported to Customer Service go down.

WORTHINESS of AWARD SELECTION

The Proactive Voice of the Customer Model has had many positive, and even unexpected results. An analysis of basic call transfer data revealed that customers of both the Clerk of the Courts and of the Code Enforcement Department were being connected in such a way as to have two different staff members answer. In most cases, the customer would have to tell their story twice, creating some irritation. At times, conflicting information or instructions were given. Following the analysis, a process to move the customer to the right function in one move rather than two was recommended. Better customer service, higher customer satisfaction. This model contributes to our ability to move beyond *survive*, and more towards *thrive* amid ever-changing physical, social and economic conditions.

Customer satisfaction, quality of services, citizen engagement, all are trending upwards from what were fairly unimpressive levels of performance. More service with less money. And while there is still plenty of room for improvement, the data supports that we are on the right track, moving in the right direction.



Data in Support of Performance Improvement