TO: HONORABLE MAYOR AND
CITY COUNCIL

FROM: Dolan Beckel

SUBJECT: SEE BELOW

DATE: April 5, 2024

Approved	Date
[signature]	4/5/24

INFORMATION

SUBJECT: **DELIVERING EXCELLENT CUSTOMER SERVICE FOUNDATIONAL STRATEGIC SUPPORT FOCUS AREA STATUS UPDATE**

This information memorandum provides an update to the City Council on the progress of the *Delivering Excellent Customer Service* Foundational Strategic Support Focus Area which seeks to implement the Customer Service Vision and Standards recommendations (Recommendations), including a performance management framework documented in the City Initiatives Roadmap: Customer Service Vision and Standards Initiative Report (Report) approved by the City Council on March 7, 2023.

Executive Summary

Since the City Council approval of the March 7, 2023 Report, the Administration has made substantial progress on many of the Recommendations with a focus on the following four recommendations outlined below.

1. **Customer Service Center for Excellence Team**
   a. Recruited and hired a dedicated customer service staff in the City Manager's Office and the Information Technology Department (ITD) to drive forward the Recommendations.
2. **Customer Service Training**
   a. Created, piloted, and refined an initial set of self-paced customer service competency training modules that will be available to all City Council Offices and Appointee staff during the spring of 2024.
   b. Conducted 15 Customer Service Vision and Standards awareness information sessions and learning workshops with department leaders and staff.
3. **Centralized Customer Relationship Management (CRM) System**
   a. Made substantial progress implementing new CRM technology architecture and deployed three major project releases within this evolving architecture.
   b. Contracted a consultant to develop the high-level requirements and design for a centralized CRM system to provide a 360-degree view of the City's customers, touchpoints, and cross departmental service request workflows.
   c. Started the collection of the high-level CRM requirements and design.

4. **Customer Service Incremental Improvements ("Quick Wins")**
   a. Continued to leverage existing City Manager's Office and departmental staff to identify and partner, as needed, with other departments to implement additional incremental customer service improvements.

Status Update Details

This section expands the information provided in the above Executive Summary.

1. Customer Service Center for Excellence Team

Four external hires were recruited during the summer and fall of 2023 and onboarded during January and February of 2024. Managed within the City Manager's Office, these staff members form the basis of the Customer Service Center for Excellence Team to drive the *Delivering Excellent Customer Service* Foundational Strategic Support Focus Area. The Center for Excellence Team members are:

- *Customer Service Lead* – An Assistant to the City Manager who rejoined the City after 10 years of prior experience with the Environmental Services Department as well as seven years in state and county government with experience in executive management over a range of large customer-facing services in environmental and behavioral health, including animal services, garbage and recycling, and public health protocols. Additionally, the Assistant to the City Manager brought another five years of experience in non-profit and private sector positions with responsibility for community and volunteer engagement. The Assistant to the City Manager leads the team, driving the customer strategy and managing collaboration across all departments, City Council Offices, and partners.
- *Cultural Change Lead* – A Senior Executive Analyst who rejoined the City with over six years prior experience with the Planning, Building, and Code Enforcement (PBCE) Department with the Development Services Transformation Project. This team member also has two years' experience leading another local jurisdiction's customer service permitting front desk. This Senior Executive Analyst leads the customer service cultural change aspects, including training and performance management.
- *Execution Support Analyst* – An Executive Analyst who joined the City after one year with another local jurisdiction and 14 years of customer service experience in the private sector. This Executive Analyst leads the effort to develop high-level requirements and design work.
- *Customer Service Products-Projects Manager* – A Products-Project Manager with ITD who joined the City after nine years of experience implementing technology for the public good at three local non-profit organizations. This Products-Project Manager oversees the technology implementation of all customer service projects with a focus on Salesforce.

In addition, a Salesforce architect is supporting the development of a Citywide Salesforce technical architecture that includes, but is not limited to, data consolidation, workflow consolidation, and new functionality detailed below. Salesforce is cloud-based software that is used to bring together data from a variety of sources for a 360-degree view which is intended to assist organizations in providing a better experience to the customer.

The City Manager's Office and ITD are continuing to work to assess Salesforce needs and will align staffing resources appropriately.

Moving forward, the Customer Service Center for Excellence Team will focus on three workstreams outlined below.

- **Large Scale Process and Technology Projects** – example projects include, but are not limited to:
    a. Document current customer service processes and defining desired future processes in partnership with departments;
    b. Develop the high-level requirements, design, and implementation sourcing strategy for the integrated CRM;
    c. Support cross-department collaboration to ensure CRM processes are aligned to better serve the community; and
    d. Support Citywide culture change to embrace new processes and the integrated CRM system.
- **Incremental Departmental/Program Customer Service Improvements** – example projects include, but are not limited to:
    a. Support the Publics Works Department (DPW) Animal Care and Services (ACS) team by documenting key processes to better serve its customers (public, animal advocates, and homeless pets);
    b. Help ACS navigate solutions that combine process, people, and light weight technology; and
    c. Provide ACS management support for needed future re-tooling.
- **Incremental Citywide Customer Service Improvements** – example projects include, but are not limited to:
    a. Provide tools to empower staff;
    b. Assist with minor process and technology tweaks; and
    c. Connect departments with existing Citywide customer service resources.

2. Customer Service Training

One of the Recommendations stated, "develop tools and training for improving internal and external connectivity and invest in customer service-related professional development opportunities." As a first step towards accomplishing this recommendation, the City Manager's Office created a portfolio of three self-paced, e-learning modules designed to better equip newly onboarded staff to deliver excellent customer service.

The three modules include:
- Customer Service Vision and Standards 101;
- Customer Conversation Guide; and
- Customer Service for Access and Inclusion.

The modules were created by City staff and piloted with the following departmental teams: ITD SJ311 Contact Center; Library Department branches; Parks, Recreation, and Neighborhood Services (PRNS) Department community centers; PBCE's Development Services Permit Center; DPW ACS; and, the Department of Transportation (DOT) Dispatch. The pilot phase was evaluated by participants and included a zero to 10 rating of how helpful the module was for customer service onboarding. The modules received an overall staff rating of 7.4 out of 10, which surpassed the success metric target of six out of 10.

The City Manager's Office is pursing next steps for these trainings, including:
- Partnering with the Human Resources Department to roll-out the trainings Citywide, including all City Council Office and Appointee staff;
- Exploring future learning competency topics to incorporate into the portfolio; and
- Identifying additional specialized professional development opportunities that are position specific or more effectively delivered in a format other than an e-module.

Upon City Council adoption of the Customer Service Vision and Standards, the City Manager's Office initiated a "Customer Service Roadshow" with the goals of building awareness of customer service efforts, creating shared language for culture building, and building capacity through methods and mindsets for customer service excellence. Overall, the City Manager's Office conducted 15 workshops and professional development sessions with departments across the City on topics ranging from the new Customer Service Vision and Standards, managing escalations and conflict resolution, customer personas and journey mapping, and challenging customer interactions. The Customer Service Center for Excellence Team is also prepared to provide "Customer Service Roadshows" to City Council Offices upon request.

3. CRM System

One of the observations listed in the Report stated "the City does not currently have the technology to retrieve, process, track, coordinate, and ensure follow through on customer inquiries. The lack of centralized data collection and metrics leads to a fragmented understanding of customers." The associated report recommended staff "implement a CRM solution to centralize customer data collection, tracking, and sharing."

Upon review of best practices and current software assets already competitively procured by the City, the Administration is standardizing the Salesforce application for the centralized CRM system. With support from the City Manager's Office, ITD has made initial progress consolidating disparate customer service functions into a centralized CRM system, including:

- Implementation of a foundational CRM technology architecture that includes Salesforce CRM and MuleSoft software components;
- Implementation of the new Encampment Management application within the centralized CRM system;
- Development of the new Vehicle Concerns application within the centralized CRM system;
- Migration of the Housing Department Rent Registry into the centralized CRM system; and,
- Planning for the migration of the DOT and SJ311 customer service request workflows from a soon to be sunsetting standalone CRM system into to the new centralized CRM workflows.

However, with over 20 City departments and offices and 11 Mayor and City Council Offices providing customer service to our residents, businesses, and other types of customers, there is much work ahead to provide a centralized CRM system that is integrated Citywide and provides a 360-degree view of the City's customers, touchpoints, and cross-departmental customer service request workflows. To reach this goal, additional planning is necessary, including current and

future state process mapping, requirements definition, technical design, and the formulation of an incremental delivery plan. Through a competitive process, the City engaged consultant firm BerryDunn for this work which started in earnest in March 2024.

4. Customer Service Incremental Improvements ("Quick Wins")
In parallel to the above, staff from the City Manager's Office, ITD, and other departments continue to identify and implement additional incremental customer service improvements ("Quick Wins"). The **attached** Customer Service Incremental Improvements Status shows the status of these improvements.

Next Steps

The below **table** summarizes the next steps in the progress of the City's *Delivering Excellent Customer Service* Foundational Strategic Support Focus Area.

Table: Delivering Excellent Customer Service Next Steps

Task	Timeframe (2024)	Workstream
Document key critical service delivery customer service processes for ACS.	March - October	Incremental Department/Program Customer Service Improvements
Interview departments and map current and future processes and requirements.	March - May	Large Scale Process and Technology Projects
Support request for additional 2024-2025 funding to continue and scale-up the implementation of the new CRM system.	March - June	Large Scale Process and Technology Projects
Support effort to bring Neighborhood Association Engagement Model to Neighborhood Services Committee.	April	Incremental Department/Program Customer Service Improvements
Roll-out Citywide self-paced Customer Service Vision and Standards Training Release 1.0.	April	Incremental Citywide Customer Service Improvements
Finalize Salesforce license agreement and secure City Council contracting approval.	April	Incremental Citywide Customer Service Improvements
Interview City Council Offices and map current and future state processes and requirements.	April - May	Large Scale Process and Technology Projects
Develop multi-year implementation plan, including a sourcing strategy (augment in-house, hire business integration firm, or other sourcing strategy) for the remaining work.	June - July	Large Scale Process and Technology Projects
Issue a Request for Proposals business integration services, if necessary.	June - July	Large Scale Process and Technology Projects

Task	Timeframe (2024)	Workstream
Finalize total cost of ownership based on Request for Proposals implementation cost responses and department impact assessments.	August - September	Large Scale Process and Technology Projects
Issue next Information Memorandum	September - October	All three workstreams
Implement first release of centralized CRM with basic functionality and minimal data integration depending on selected implementation plan and sourcing strategy.	Fall 2024	All three workstreams
Continue incremental department and Citywide customer service improvements.	Ongoing through Fiscal Year 2026	Incremental Department/Program Customer Service Improvements Incremental Citywide Customer Service Improvements
Continue incremental functionality enhancements and incremental data integration to increasingly achieve the Citywide 360-degree view of customer data, customer touchpoints, and cross departmental interactions subject to the availability of funding.	Ongoing through Fiscal Year 2026	Large Scale Process and Technology Projects

/s/
DOLAN BECKEL
Chief of Staff for the City Manager
City Manager's Office

For questions, please contact Kristina Gallegos McCaffrey, Assistant to the City Manager, at
Kristina.McCaffrey@sanjoseca.gov

Attachment: Customer Service Incremental Improvements Status

Customer Service Incremental Improvement Projects *completed*:	26
Customer Service Incremental Improvement Projects *in progress*:	6

Department	Customer Service Issue	Improvement Summary	Status
All Departments	Some employees were unaware of the Citywide access to translation and interpretation services for language access which led to inconsistent ability to translate information into constituent's language of choice.	The City Manager's Communications Office distributed a Citywide email to educate staff on these services and connect them with correct resources. Center for Excellence staff is continuing to further educate on these resources as needed.	Completed
City Council Offices	Certain City Council Offices were unaware of language translation and interpretation resource available for their use in engaging customers.	The City Manager's Communications Office distributed the language access tools specifically for support services, vendors, and the language equity policy for use in their customer service delivery.	Completed
City Council Offices	City Council Office staff were unaware of City resources to support customer service delivery and customer inquiries.	Twenty-six City Council staff were trained to understand how SJ311 reporting processes work and how to look up SJ311 inquiries for their customers.	Completed
City Manager's Office	City staff have varying levels of customer service experience and need learning and development opportunities during on-boarding phases to enable better dialogue and support for customers.	City Manager's Office staff developed a self-paced e-learning module Customer Conversation Guide to provide best practice phrasing, strategies for showing empathy, tactics for deescalating difficult conversations, and staff rights for how to exit harmful or dangerous conversations.	Completed

City Manager's Office	A key community-based organization was feeling disconnected from a variety of City services for which they were in need, yet unaware.	The City Manager's Office connected the partner to a variety of City resources and relationships, including COVID-19 Recovery, the Office of Economic Development and Cultural Affairs, and Energy Department services.	Completed
City Manager's Office-Communications	City Hall first floor staff (customer service desk and security teams) were unable to successfully engage American Sign Language support for customers.	The City Manager's Communications Office conducted a live demonstration with the teams to enable them to practice a more seamless language access experience.	Completed
DOT	The DOT dispatch team needed assistance during events like storms or when delayed in answering calls and sending emails.	SJ311 and DOT conducted a successful pilot from 01/25/23 - 02/16/23 to ensure the SJ311 team was prepared to provide support services for DOT dispatch calls during major events. The pilot revealed that assistance is most impactful when DOT is inundated with calls during storms and other events. The pilot also revealed the opportunity for SJ311 to assist with DOT callers on low-volume days as well, allowing DOT staff to focus on service delivery on both high-volume and low-volume days.	Completed
DOT	The main DOT contact webpage contained an inactive number and line that lead to an inactive voicemail box.	The department contact number was updated and aligned to the correct phone number, enabling clearer and successful customer navigation.	Completed
DPW-ACS	Callers to ACS using certain phone systems could not interact with the City phone tree, resulting in audio codes that could not be received by the phone system.	Implemented a "timeout" feature that puts a caller into a queue with a live person when the system is unable to receive audio codes from a caller.	Completed

DPW-ACS	The ACS phone line was routing all non-emergency customer inquiries to the same voicemail.	Staff updated the call flow (e.g., reviewing for any "dead end" pathways like the "Customer Representative" option).	Completed
DPW-ACS/ITD-SJ311	Customer calls rerouted to SJ311 were occasionally unanswered due to staff meetings leaving gaps for answering calls.	The SJ311 weekly team meeting length was reduced from 60 minutes to 30 minutes to decrease windows of times when representatives are unavailable during a workday. SJ311 updated training for overflow partners so that there is always a representative available for escalations.	Completed
ITD-PRNS	The PRNS park reservation website set a timeline to book, processing timelines, and payment expectations too late in the process, resulting in frustrated customers that would be too late to reserve a park.	The PRNS park reservation team updated its website to set a timeline to book, processing timelines, and payment expectations earlier in the webpage journey, giving the customer the ability to understand City processes more clearly.	Completed
ITD-SJ311	Call center training and shadowing sessions were only one sided and did not have the ability for those in training to hear both staff and customer experience.	The Customer Service Center for Excellence introduced a web-based application that allowed for a trainee to listen to both sides of the conversation and fully understand the customer experience.	Completed
ITD-SJ311	Customers were unaware when they were being transferred outside of SJ311, creating confusion about who customers were speaking with.	The SJ311 team has implemented an automated message to alert callers when they are being transferred from the SJ311 line to an external department (e.g., DOT).	Completed

ITD-SJ311	Customers were not always transferred directly from the SJ311 Customer Contact Center to the appropriate department, instead hitting a dead end for customer service.	The SJ311 Customer Contact Center moved to a warm hand-off model to other departments coming into the main customer service line to ensure that inquiries move forward to resolution.	Completed
ITD-SJ311	Language translation and interpretation requests were going to a web request email not regularly monitored, resulting in service requests that may not be provided in time.	SJ311 implemented centralized translation/interpretations requests for City documents and City meetings to come into customer service emails. The team updated a resource flyer in four languages (English, Vietnamese, Spanish, Chinese) detailing how to access services.	Completed
ITD-SJ311	Spanish speakers using the SJ311 chat were receiving responses in English.	Spanish live chat is now only available when there is a Spanish speaking representative. SJ311 staff are encouraged to utilize Google translate.	Completed
ITD-SJ311	Staff were not able to track how customers heard about SJ311 to understand who the service is reaching.	SJ311 added a question to the request intake process to collect information on how customers heard about the service.	Completed
ITD-SJ311	The hold message of the SJ311 phone tree was not translated to Spanish.	Spanish SJ311 hold message was added to the phone tree.	Completed
ITD-SJ311/DOT	Information was inconsistent across DOT webpages. Non-English language representation was also not uniform.	The SJ311 and Communications teams worked to update all relevant information in English and non-English languages.	Completed
Library	Attachments on many City webpages, including the Library, were not able to use built-in software to translate attached content automatically for users.	The Library Public Information team transitioned away from using attachments for critical service information and instead created webpages that can use the native translation tools to make pages in-language for users.	Completed

PBCE-Development Services	Staff were unable to run reports to track what a caller self-selects in the phone tree when calling the Development Services phone line.	Staff now have the ability to track phone tree calls. Additionally, staff can now automate and pull reports based on the caller's choices while in their phone tree. This allows management to understand what callers are calling about and directions for future phone tree, messaging, and staffing improvements.	Completed
PBCE-Development Services	Permit customers were being routed to an incorrect form on the Planning website.	The link was corrected to route customers to the Development Services Application Wizard.	Completed
PRNS	PRNS Community Center front desk staff were looking to ensure consistent and accurate customer service due to the nature of dynamic staffing and part-time positions that deliver important customer service support to community members.	The City Manager's Office and SJ311 team provided PRNS managers with the customer service training resources and SJ311Frequently Asked Questions (FAQ) page which provides a starting point for new staff and experienced staff to learn about services not within their domain of expertise.	Completed
PRNS	Customers were unable to make a park reservation seven days a week.	Changes were made to the website that informed the public how to reach a live representative seven days a week through a hotline.	Completed
Energy	The Energy Department Call Center is run by a third party that does not fully meet the needs for customer service excellence and service delivery goals and service levels.	The department is working to explore bringing its call center services in-house through SJ311 Customer Contact Center.	In Progress
ITD-SJ311	SJ311 start up pages were translated – attachments, forms, and pages with many clicks within the website were not.	Website translations with SJ311 products are being analyzed and any gaps will be identified with the appropriate team.	In Progress

ITD-SJ311	SJ311 FAQ tool had untranslated responses over a certain number of characters that could not be translated into Vietnamese and Spanish by the tool utilized.	The SJ311 team is exploring the use of the sanjoseca.gov translation service (which does not have this same issue) as a possible solution for the SJ311 FAQ service.	In Progress
ITD-SJ311/DOT	The reception and coordination of responses to vehicle-related concerns across departments was leading to very low customer satisfaction.	SJ311 and DOT staff are implementing an enhanced reporting system by integrating two existing separate CRM systems for 'Vehicle Concerns' in order to expand reporting options and provide a centralized coordination and tracking system to improve customer service.	In Progress/ Live Soon
PBCE	Signage at the Information Desk was not consistently translated for in-person customers requiring language access.	PBCE staff are exploring translating critical information on City signage and updating information for translation services for staff at the counter.	In Progress
PBCE	Planning permit virtual appointments are currently set through Microsoft Teams. Customers are less familiar with this software, compared to alternatives, leading to customer technical issues and more frequent appointment unattendance.	PBCE and ITD are exploring backend functionality to understand if automatically generated meeting links could be switched to alternatives without impacting wider department operations.	In Progress