



THE CITY OF SAN DIEGO

## Report to the City Council

DATE ISSUED: October 19, 2016 REPORT NO: 16-076

ATTENTION: Honorable Members of the Rules Committee,  
Meeting of October 26, 2016

SUBJECT: 311 Customer Experience Roadmap and Get It Done Pilot Update

REFERENCE: Mayor's One San Diego Transition Advisory Committee  
[Blueprint](#), [Performance Audit](#) of the City's Public Right-of-Way  
Maintenance Activities

REQUESTED ACTION: Information Only Item

STAFF RECOMMENDATION: Information Only Item

### EXECUTIVE SUMMARY OF ITEM BACKGROUND:

The City Auditor's Performance Audit of the City's Public Right-of-Way Maintenance Activities (May 2015) and the Mayor's One San Diego Transition Advisory Committee Blueprint recommended that the City improve customer service by exploring options to implement a 311-style customer service platform. To actively address this recommendation, the City Council created a 311 Project Coordinator position in the FY 2016 budget.

The primary objective in FY 2016 was to develop a plan for Citywide implementation of a 311 program. The results of this effort, the "311 Customer Experience & Service Delivery Roadmap" is provided with this report. In addition to the roadmap, Performance & Analytics was able to partner with the Transportation & Storm Water Department and Department of Information Technology on the development and launch of the "Get It Done" pilot project. Get It Done updated the public web interface and launched a new mobile app, in addition to updating the system employees use to process incoming reports.

As part of the FY 2017 budget, the City Council approved the addition of a Program Manager, two Project Coordinators, and related non-personnel expenditures. This will enable Performance & Analytics to build on the success of the Get It Done pilot and continue implementation of the Roadmap.

### BACKGROUND:

Stemming from a 1996 experiment in Baltimore to reduce the number of non-emergency calls handled by 911, 311 programs have spread across North America to many cities. Out of the top 20 cities by population, all have 311 programs, with the exception of Phoenix and San Diego. What was initially an effort centered around voice phone calls now includes many other communication channels. The focus now is on the overall customer experience, mapping the customer journey from start to finish, eliminating "pain points" throughout

the process, and improving customer service levels. To describe this broad focus, the program is called 311 Customer Experience.

San Diego is approaching 311 from a unique position. In the past 20 years, technology has changed significantly and so have customer expectations. We are taking a customer-first approach to developing a 311 system that meets the demands of customers. Customers want to communicate with the City on the communication “channel” or method they prefer, regardless of whether it is a phone call, e-mail, U.S. mail, social media (Twitter, Facebook), a web site, or a mobile app. What we called “call centers” are now “contact centers” and Customer Relationship Management (CRM) technology provides tools that allow the City to more efficiently deliver services and engage with customers.

The last formal analysis by the City on this subject occurred in 2007 – the year the iPhone launched. Since the iPhone’s launch and with continual web innovations and social media acceptance, customer expectations have shifted. Instead of strictly investing in building a call center, we are taking a more strategic approach. By making online services easier to use and information more accessible, we can allow people to remain online rather than having to make a phone call. The intent is not to ignore or displace customers that prefer to use the phone, but rather to pursue a balanced approach that includes offering more efficient and desirable options for reaching the City.

The City’s recent Resident Satisfaction Survey asked, “What would be your preferred method for reporting problems to the City?” 83.3% of respondents would prefer to report problems to the City without making a phone call: 50.4% selected the web, 19.6% chose a mobile app, 13.4% would like to make a call, 8.9% would type a text message, 4.4% would post to social media, and 3.3% had no preference. It’s important for the City to provide tools that allow customers and employees to communicate seamlessly on multiple communication channels. The 311 Roadmap provides a phased approach to implementing a 311 program.

#### ROADMAP OVERVIEW:

The City engaged Stern Consulting to assist with the development of a 311 Implementation Planning Project Roadmap. The roadmap is attached to this report. The roadmap details the business case, lessons learned from previous CRM deployments, the proposed phasing plan, and next steps. Over time, customers will have a one-stop resource for information and a central intake point for service requests. The goal is to handle customer requests on the first contact, rather than having to refer or transfer customers to other departments. There are many components of the project, which will take a phased approach to implement effectively.

CRM software will allow the City to track requests for services and information from a centralized system. For example, a customer will make a request through the communication channel of their choice and receive a tracking number. If the request is for information only, the knowledgebase will provide an answer. If the request is for a service, the CRM sends the request to the appropriate work order system in the department that delivers the service. Once the work order is completed, the work order system sends a response back to the CRM. The CRM can track the “start” and “end” time stamps for a customer request, allowing for an accurate view of how long different types of customer requests take to be resolved.

### Knowledgebase Development

In order to provide reliable, accurate, and consistent information to customers, a centralized knowledgebase is essential. Referred to as the “single version of the truth,” the knowledgebase allows customers and employees to find answers to questions during the first contact. Customers can access information on the web site and employees can utilize the knowledgebase to answer questions. A centralized knowledgebase does not currently exist which makes it challenging for customers to get answers and for employees to efficiently handle requests. The knowledgebase will enable the sharing of institutional knowledge, which tends to be segmented in department silos and lost when employees retire.

### Business Process Improvement

All service requests that are going to be included in the system will be mapped out, prior to being integrated with the CRM system. As business processes are reviewed for integration with the CRM system, this will lead to opportunities to improve the process. CRM software allows for certain tasks to be automated and steps in the process to be tracked and measured. This provides opportunities for continuous improvement. Similarly, when knowledgebase articles are drafted, this will expose procedures or policies in need of revisiting.

### Reducing Non-Emergency 911 Calls

The initial goal which led to the creation of 311 was to reduce the number of non-emergency calls received by 911. Promotional material for one program describes it this way: “Burning house? Dial 911. Burning question? Call 311.” The 311 program will coordinate with the Police Department to improve options for accessing non-emergency services.

### “Get It Done” Pilot Project

The Transportation & Storm Water (TSW) Department and Performance & Analytics (P&A) Department initiated a pilot project to improve the way problems are reported to the City. The project involved creating a new public web site for reporting street-related problems, along with a new mobile app. As part of this project the City is utilizing a CRM software system which connects to TSW’s SAP work order system. Phone calls, e-mails, and reports of problems received through the web site and a mobile app are processed through the CRM system. The new system provides more flexible tools for employees and customers to communicate with each other and allows for more efficient request processing. The pilot allows for an improved experience for both customers and employees. Lessons learned will inform the larger Phase One rollout of the 311 Customer Experience program.

The pilot launched on May 20, 2016. As of October 1, over 26,000 reports have been made through Get It Done and over 7,800 users have downloaded the mobile app. The breakdown of reports by origin is approximately 37% from the web, 41% from the mobile app, 15% from phone calls, with the remainder from e-mail and other sources. The breakdown in case origin is aligned with the results of the Resident Satisfaction Survey.

To complete the customer service feedback loop, customers are offered an opportunity to take a survey when their report has been closed. This provides an opportunity for positive feedback to be shared with the teams within the department. This feedback mechanism also

allows us to follow-up with customers with low survey ratings and make adjustments to improve future survey results.

The pilot was primarily focused on services provided by TSW. The CRM system is directly connected to the TSW SAP work order system, which allows for ongoing status updates on a report's resolution. Certain reports have to be referred to other departments, such as Environmental Services, Park & Recreation, or Public Utilities. When reports are referred, status updates are not sent back to the CRM system, and customers receive less detailed information on the resolution of their report. As we expand the system to the Phase One departments and functions, this problem will start to be eliminated as we are able to gain more connectivity to the corresponding work order systems. As an example, with the Phase One deployment, Environmental Services' work order system and web interface will be replaced, which will improve operational efficiencies and the customer experience.

### Timeline

Fiscal Year 2017 includes building the 311 Customer Experience team, creating the knowledgebase and knowledge management strategy, developing the CRM system requirements, issuing an RFP, and selecting a vendor. The project team consists of a Program Manager and three Project Coordinators. The Project Coordinators will focus on three specific areas: Knowledge Management, Technology & Innovation, and Business Process Improvement.

By the start of Fiscal Year 2018, it is anticipated that a vendor will be selected for CRM system implementation, pending available funding. The soft launch of Phase One and a centralized contact center would occur in the second half of FY 2018.

Once the program has stabilized, the Phase Two (and later) teams and functions will be added to the program. As additional services are added, system integrator services will be engaged to analyze the processes and modify the software accordingly.

### CITY STRATEGIC PLAN GOAL(S)/OBJECTIVE(S):

Goal #1: Provide high quality public service.

Objective #1: Promote a customer-focused culture that prizes accessible, consistent, and predictable delivery of services.

Objective #2: Improve external and internal coordination and communication.

Objective #3: Consistently collect meaningful customer feedback.

Objective #4: Ensure equipment and technology are in place so that employees can achieve high quality public service.

Goal #2: Work in partnership with all of our communities to achieve safe and livable neighborhoods.

Objective #3: Invest in infrastructure.

Objective #5: Cultivate civic engagement and participation.

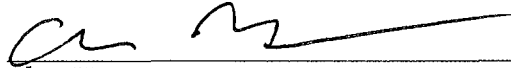
FISCAL CONSIDERATIONS: To continue the implementation of the 311 Roadmap, additional expenditures will be required as part of the FY 2018 budget.

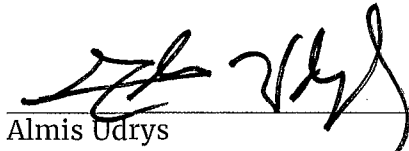
EQUAL OPPORTUNITY CONTRACTING INFORMATION (if applicable): Not applicable.

PREVIOUS COUNCIL and/or COMMITTEE ACTIONS: None.

COMMUNITY PARTICIPATION AND OUTREACH EFFORTS: In development of the roadmap, meetings were held with numerous stakeholder departments. The 2015 Resident Satisfaction Survey also informed the development of the roadmap. Members of the public and employees participated in the development of the Get It Done pilot project. Customer feedback from the Get It Done pilot is being incorporated into the Citywide deployment of the 311 program.

KEY STAKEHOLDERS AND PROJECTED IMPACTS: Residents/customers interacting with the City of San Diego and Citywide Departments.

  
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Alex Hempton  
Program Manager, Performance & Analytics

  
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Almis Udrys  
Director, Performance & Analytics

Attachment: 1. 311 Customer Experience & Service Delivery Roadmap