

Unified Call Center Analysis

*Follow-up to F&P Committee
Questions*

October 28th, 2009

The UCC is a unique opportunity in the 2010 budget to reduce costs while improving service to citizens and response to elected officials

UCC Summary

- UCC improves customer service, reduces costs, and enhances the information about call resolution available to elected official and managers
- Project development will involve key officials from City departments and provide elected officials with considerable opportunities for oversight and a “policy stop” on costs
- Unified Call Center proposal addresses deficiencies current system and creates significant new management value
- “Unified” approach builds off customer relationship software which is a proven technology application

History of 286-CITY

- Before 286-CITY, citizens had to navigate the city's extensive phone listings themselves
- 286-CITY provided one phone number for citizens to access city government
- 286-CITY is now a switchboard system to handle many DPW calls or transfer callers to other departments or DPW divisions
- **The original 286-CITY was an improvement and continues to be used by citizens (2008-229,000 Calls)**
- Cost of 286-City was for marketing efforts
- **286-CITY marketing costs will not be wasted. The Unified Call Center will continue to use the 286-CITY phone number**
- 286-CITY project did not: create a unified call center, create a citywide work-order system or minimize the complexity of existing IT systems

Concerns with Current System

- Transferring callers can lead to citizen frustration and lack of follow-up
- Inconsistent quality control for call takers
- Insufficient performance measures for constituent relations, budgeting, or general management
- Problems identified by Council members and AIM
 - “Resolved” call that is not resolved
 - “Closing” duplicate service request that is not completed
 - Excess data entry and paper-> reduced data accuracy
 - Nuisance litter and vacant lots
 - Earn and Learn Information
 - Overwhelming H1N1 Flu Call Volume
- Supporting multiple call centers and incompatible departmental IT and work-order systems is expensive.

Existing Service Request Systems We Are Maintaining

- Two web request services
 - E-services (General - Interdepartmental)
 - DPW Service Request Site (DPW specific)
- Neighborhood Services System (NSS)
- DPW Call Center Application
- Parking (paper documentation)
- Water Works daily operations log (word document) and Access work order database
- DCD: E-Permits
- Common Council/Mayor: (Contract/GovQA)

Maintaining various databases increases integration costs and limits data access & analysis

Benefits of a Unified Call Center: Improved Customer Service

- 24/7 access to city services and information
- Up to 70% of calls handled by the UCC call staff without transfers
- Route the service request to the correct department, rather than the caller.
- More consistency in answering citizen questions
- Improved council staff or citizen tracking of service request status
- Quality assurance of how phone calls are handled
- Automatic email response for service resolutions

Benefits to Council Members

- District specific reports on requests for City services and departmental response
- Auto-notification of overdue service requests
- Information about residents who are receiving City services.
- Track the status of your constituent service requests online.
- Improve information for budgeting and requests to fill vacancies

Benefits of a Unified Call Center

Increase Transparency and Accountability

- Clear response time goals and compliance monitoring (through Service Level Agreements)
- Elected Officials can access to performance reports through performance “dashboards”
- Easy GIS mapping of calls by service area, census tract or aldermanic district
- Improved tracking of service response that involve multiple departments or divisions
- Information request and comment tracking

Example Service “Dashboards”

Ward

Select Prior Days



Calls: 601

8/5/2009 - 311 Activity

Hits: 155



Top 10 Calls for Service

Service Type	Count
	170
POL - ORDINANCE SQUAD	36
DPW - BULK PICK UP	32
DPW - RADIO RESIDENT ERRO...	25
DPW - BARREL REPAIRS/REPL...	15
DPW - SOLID WASTE INQUIRIES	13
DPW - ADD COLLECT	8
TF - NEEDS BIN RETURNED,PA...	8
DPW- FIELD INSPECTION	6
COLL - REAL EST	4
PRK - FORESTRY REQUEST	4

Top 10 Calls for Information

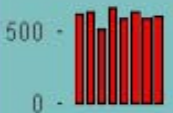
Service Type	Count
	331
CCLERK - INFO	41
COLL - REAL EST INFO	40
HOUS - INFO	35
DPW - BULK	30
COLL - EXC INFO	18
DPW - TRASH INFO	17
My Quick Ticket	16
PARK - INFO	16
311 - INFO	13
ASSR - REAL EST INFO	13

Top 10 FAQ Hits

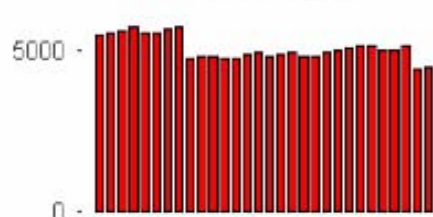
Question	Count
	155
How do I contact the public acces...	6
How can I find out about bus rout...	5
What is domestic violence?...	5
All information concerning the Spr...	4
If there is a suggestion, comment ...	4
If my trash day falls on a holiday ...	3
What happens if I have started a ...	3
What is a foreclosure?	3
Are the checks ready and when d...	2
Do I need identification to obtain a...	2

Last 10 Days

Last 10 Days



Current Daily Request Backlog Last 30 Days



Avg Days to Resolve a Service Request - Last 60 Days

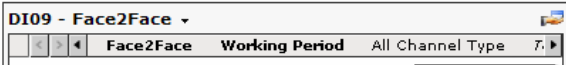
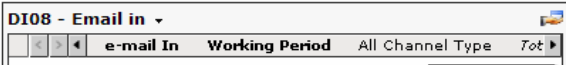
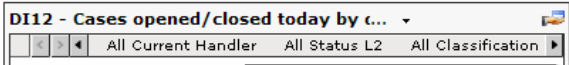
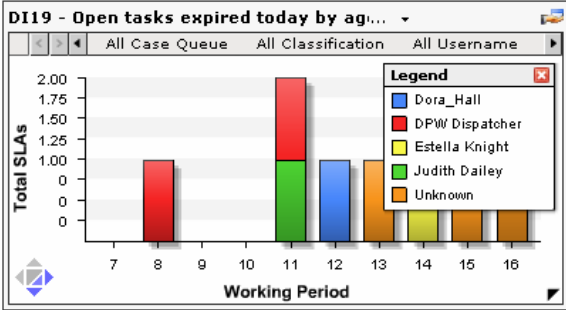
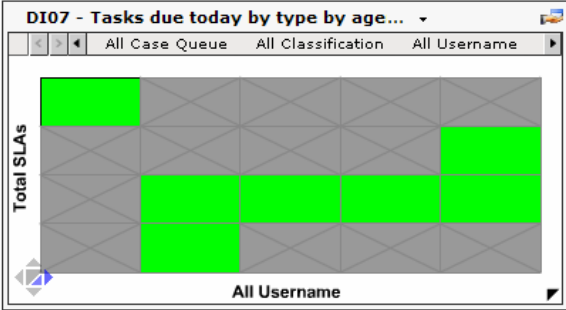
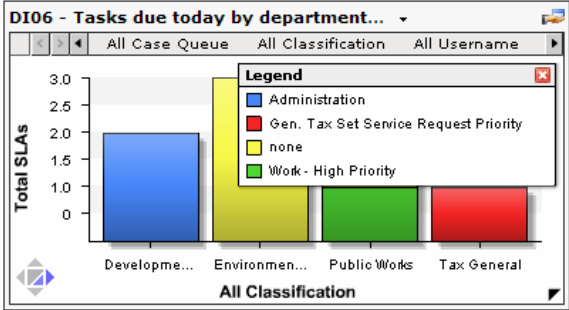
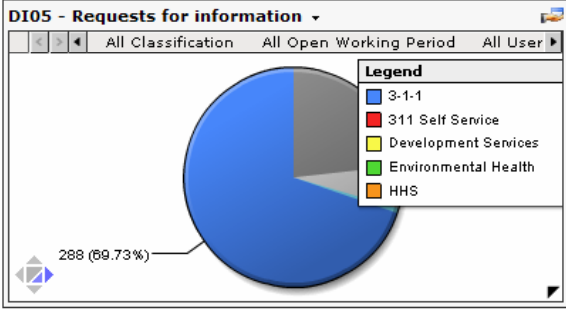
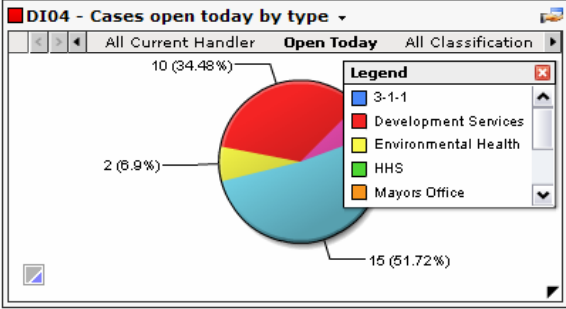
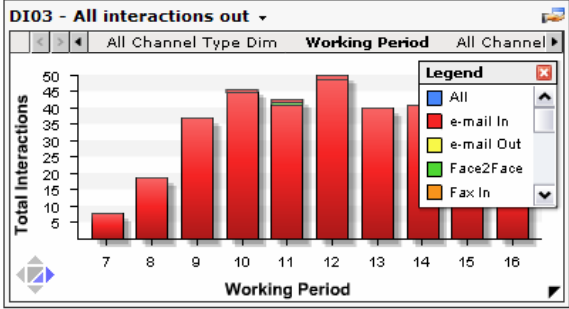
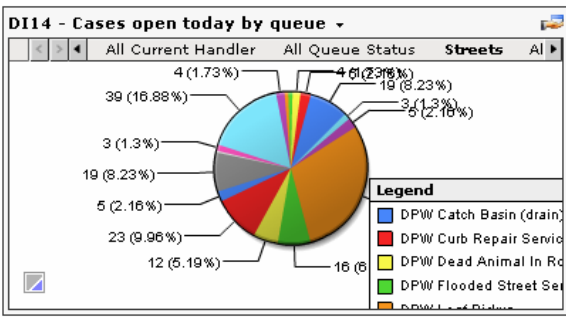
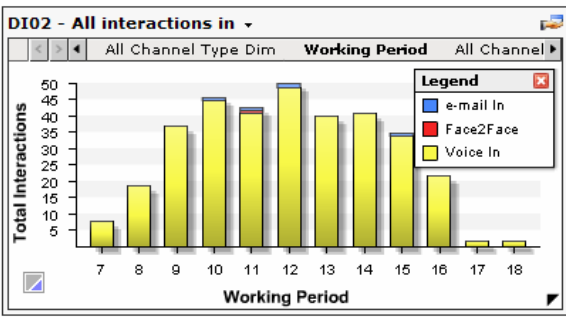
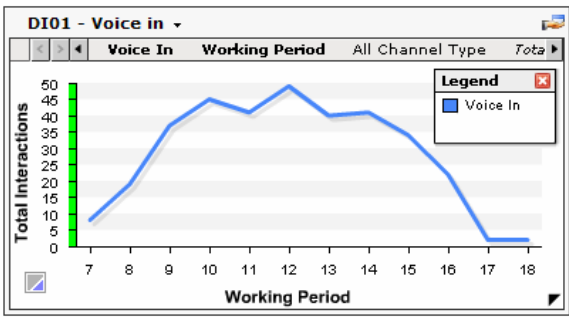
No. Requests	Service Type	No. Days
1	MAY - ANIMAL CONTROL	52
1075	TF - NEEDS BIN RETURNED,PAID	36
453	DPW - ADD COLLECT	30
102	MAY - HOUSING CODE	29
3	DPW- ENFORCMENT TRASH CUR...	28
1388	DPW - BULK PICK UP	27

SLA Performance Last 60 Days

Percent Late	Department
100%	TREASURER DEPARTME...
91%	Administration (TF)
89%	Mayor's Office
46%	Solid Waste
45%	HIGHWAY & BRIDGES
42%	Forestry
37%	ENGINEERING/BUILDING...



Company - My Matrix
 Intraday - Historical



Benefits of a Unified Call Center

Reduce Cost of Service

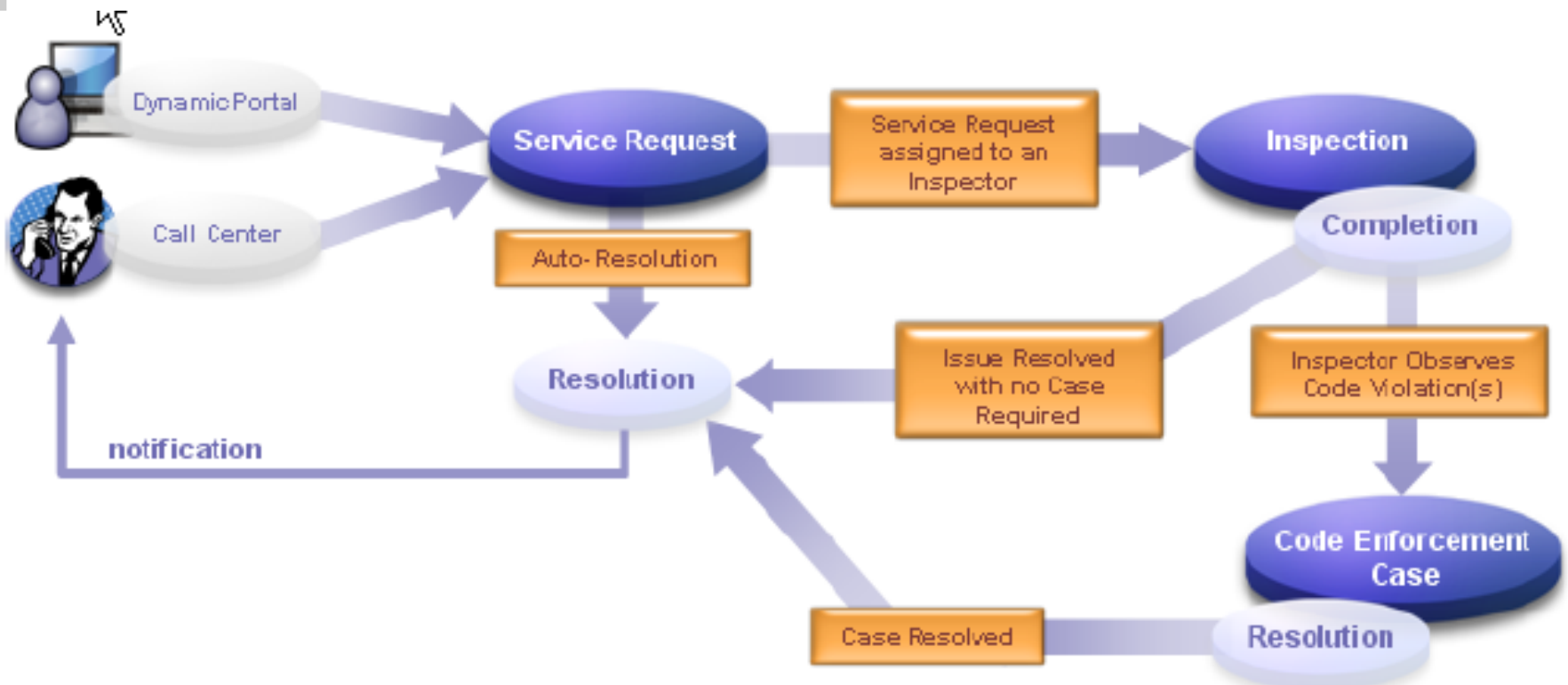
- Economies of scale for call-intake → reduced overall staffing
- Handling of duplicate service requests → reduce wasted time for field crews
- Formal process documentation of city services → consistent answers to citizens
- Identify and improve operational inefficiencies:
 - Field crews scheduling their own calls (e.g. DNS)
 - Multiple field inspections (e.g. sewer cave-ins)
- More coordinated crisis response

Unified Call Center Proposal

1. Consolidate city call takers in one department for “live” 24/7 service
2. Provide a Citizen Relationship Management (CRM) IT Solution
 - Electronic knowledge base
 - Call scripting
 - Service request intake
 - Case management
 - Business analytics

Single IT Platform for Call Intake through Departmental Resolution

Example: Code Enforcement



Phased Implementation

Phase I: Centralize existing call centers

- DPW Call Center
- City Hall Operator
- DPW Night Parking and Parking Enforcement (not citations)
- DNS
- Water Works Control Center (not billing)

Potential for Phase II

- Common Council
- DCD Permit system
- DPW facilities maintenance
- Health
- Police non-emergency
- HACM
- Election Commission
- Computer Help-Desk

Unified Call Center Tax Levy Cost/Savings Scenario- 2010 Budget

Levy Costs

Unified Call Center

1 Director: \$44,000*

1 Supervisor: \$13,532

12 CA IV's: \$121,614

16 CA III's: \$150,664

Operating: \$75,000

UCC Subtotal: \$404,810

Yr 1 Debt Service on
\$950k Capital: \$19,000

Costs: \$423,810

Gen Fund Savings

City Hall Operator

5 CA IVs: -\$48,092

DPW Admin Call Center

1 Supervisor: -\$13,532

1 CA IV: -\$10,135

3 CA IIIs: -\$27,864

Temp Staffing: -\$20,000

DPW-Admin: -71,531

DNS

3 CSR IIs: -\$27,000

1 CSR I: -\$8,824

DNS: -\$35,824

Savings: \$155,447

New Revenues

Parking Fund Transfer
+ \$340,000 (**Achievable through reduction of 21 staff positions and temp staffing**)

Sewer Fund Transfer
+ \$50,000

[*Water Work reimbursable to salaries: \$44,000 → total Call Center Director Salary of \$88,000]

Revenues: \$390,000

Tax Levy Savings: Revenues + Savings – Costs = \$121,637

Note: The amendment to eliminate the call center does not provide a complete picture of the total levy impact of the proposal. Additional action by the Comptroller is required to adjust revenues accordingly.

Tax Levy Impact for Full Year After Phase I Implementation

Costs

UCC Salaries: \$1,200,000
UCC Operating: \$30,000
CRM Annual
Maintenance: \$100,000
UCC Subtotal: \$1,330,000

Annual Debt Service
on \$950k capital: \$123,000

**Defined Levy Cost:
\$1,453,000**

O&M Savings

Salaries: -\$622,000
Temp Staff: -\$80,000
IT Support: -\$100,000

Annual Debt Service on
legacy system
replacements:
\$180,000

**Defined Levy Savings:
\$982,000**

O&M Revenues

Parking Fund
Transfer: +\$925,000
SMF
Transfer: +\$50,000

[Water Works
Reimbursable
\$+60,000]

**New Revenue:
\$975,000**

Estimated Annual Levy Reduction: \$504,000

Controls on 2010 Budget Risk

- Net funding reduction of 6 Communication Assistants and CSRs in Q4 2010 (-1.5 FTEs)
- Position *authority* is retained for all positions in originating departments
- Achieve savings through attrition in either these titles or related titles → No layoffs in affected position classifications.
- \$75,000 in UCC operating funds can be used to pay for salaries if needed.
- Costs for phone bills are retained in originating departments
- Existing facilities and equipment will be used for new department

Capital Costs

- \$950,000 in capital is included in the 2010 budget
- Estimate based on RFI responses and 100 licensed users; but responses had wide variation
- Credible vendor cost estimates ranged from to \$400k-\$2.2m
- Capital cost include software license, hardware, integration with GIS system, installation, initial knowledge base set-up, project management, and staff training
- Service process mapping and associated system configuration would be done by Call Center Director or Consultant and ITMD to control capital costs.
- Cost variables include number of users, type of users, and integrations
- **Levy impact would still “break-even” if capital costs were \$4.8 million.**

IT Capital Costs- Other Cities

City	City/County	Cost	CRM Solution	Launch
Denver	City/County	\$3.5m	PeopleSoft/ Oracle	2006
San Francisco	City/County	Phase 1: \$1 million Phase 2: \$600,000 for web self-service and other discretionary enhancements	Lagan	2007
Minneapolis	City	\$5 million, including 911 back-up, police non-emergency, integrated voice and data; full web services and citizen feedback functionality; includes original vendor contract with Motorola that was abandoned; Lagan software costs were \$728,000	Lagan	2006

Capital Costs, Continued

- Risk Management in RFP and IT Contract
 - Clear definition of:
 - * City's Technical Environment
 - * CRM Minimum Technical and Operations Requirements
 - * CRM Functional Requirements
 - * Integrations with other city systems
 - Require significant information about vendors' financial strength
 - Build in as much performance contracting as possible, i.e., pay for deliverables

Capital Costs, Continued

- What Phase I capital funding does not include:
 - Integration with phone systems
 - Service mapping costs are in O&M budget (assumes task done by Call Center Director or Consultant)
 - 911 backup
 - Police non-emergency
 - User licenses for phase II departments
 - Integration with phase II department databases
 - Customer survey function
- 5 year budget for CRM capital should not exceed \$3.5 million
- Capital costs for additional phases of Unified Call Center would be subject to cost/benefit review and would be discretionary to the Council

Application of Best Practices

Do not view this as an IT project, but as a <i>business improvement project</i>	Service mapping by Call Center Director with the internal clout to help departments fit into the new system while minimizing IT customization costs
Establish unified call center before 311 phone number	286-CITY will be retained for near future
Avoid “Big Bang” roll-out	DPW, DNS, and knowledgebase only in phase I
Aggressive phase I timeline	Q4 2010 implementation insures focused effort
Regular Project Management reports to Mayor and Council	Report to Mayor via AIM and Council via communication files
Staff Training	Training on new system included in capital cost and quality assurance training budgeted in O&M
Purchase system that is <i>configurable and scalable</i> and reduce <i>customization</i>	Systems that can be configured to departmental processes without changing source code reduce IT vendor cost risk

Call Center Director Duties

- Manage 24/7 operation with a staff of 29
- Lead roll in “mapping” departmental service delivery processes in order to correctly configure the new system. This is a key element in controlling capital costs and can be done concurrent with other elements of system implementation.
- Assist CIO with CRM vendor project management
- Management reports to Mayor and Common Council on implementation progress
- Ensure the knowledge database and call scripting is up to date.
- Manage quality assurance of customer calls
- Work with elected officials and departments to work out any bugs in the system going forward
- Coordinate “change management” strategy with departments to ensure we are taking full advantage of the system
- Continually work to add additional services onto the CRM application
- **Key Skills and experience:** Project Management, systems process analysis (ie Six Sigma certification), and customer service supervision
- **NOTE: The classification and associated salary is subject to a DER classification study**

Service “Mapping”, Configuration, and the RFP Timeline

- ***Unified Call Center implementation provides a perfect opportunity to examine departmental processes in detail.***
- Service flow “mapping” entails working with departments to outline their process and personnel accountabilities with respect to delivering particular services.
- The CRM system should be “configurable”, giving the City the ability to change workflows, service requests, drop down menus, rules, etc without changing the source code.
 - Reduces dependency on IT system developer for system changes
 - Reduces customized changes/cost of new upgrades
 - City personnel can easily make changes to the system
- With a configurable system, the city does not need to map the flow of every service *prior* to issuing an RFP
- A truly configurable system reduces capital cost risk

Proposed Schedule

	Duration	Start	End
RFP	140d	Tue 10/13/09	Mon 4/26/10
Development of RFP	24d	Tue 10/13/09	Fri 11/13/09
RFP to Procurement Services for Review	Milestone	Mon 11/16/09	Mon 11/16/09
Prepare and Publish RFP	3d	Mon 11/16/09	Wed 11/18/09
Communication File to F&P - UCC RFP content	Milestone	Wed 11/25/09	Wed 11/25/09
RFP Release Date	Milestone	Tue 12/1/09	Tue 12/1/09
Process Mapping	96d	Mon 12/14/09	Mon 4/26/10
Vendor Questions Due	Milestone	Tue 12/15/09	Tue 12/15/09
Response to Vendor questions	5d	Tue 12/22/09	Mon 12/28/09
Proposals Due	Milestone	Tue 1/19/10	Tue 1/19/10
Review Proposals for requirements	3d	Tue 1/19/10	Thu 1/21/10
Committee Review of Proposals	10d	Fri 1/22/10	Thu 2/4/10
Evaluation Committee Meetings	5d	Fri 2/5/10	Thu 2/11/10
Communication File to F&P - RFP Responses	Milestone	Wed 2/3/10	Wed 2/3/10
Interviews & Demos	5d	Mon 2/15/10	Fri 2/19/10
Begin Contract Negotiations	Milestone	Fri 2/19/10	Fri 2/19/10
Communication File to F&P - Project Update	Milestone	Fri 3/19/10	Fri 3/19/10
Contract Negotiations	26d	Mon 2/22/10	Mon 3/29/10
Contract Executed	Milestone	Wed 3/31/10	Wed 3/31/10
Start of Implementation	Milestone	Wed 3/31/10	Wed 3/31/10
Training	18d	Wed 3/31/10	Fri 4/23/10
Software Environment	42d	Wed 3/31/10	Thu 5/27/10
Continue development of Work processes	179d	Mon 4/26/10	Thu 12/30/10
Begin Knowledge Base Development	179d	Mon 4/26/10	Thu 12/30/10
Begin Call Scripting Development	179d	Mon 4/26/10	Thu 12/30/10
Implementation of Phase 1	Milestone	Mon 11/1/10	Mon 11/1/10

Thorough 10 Month DOA Review

- Studied best practices of 311 implementation in other cities
- Met with department stakeholders
- RFI issued to vendors in August- 15 responses
- Analyzed call volumes, work flows, current systems
- Review of the costs/benefits with implications for 2010 budget & beyond
- Developed risk management approaches
- Engaged experienced consultant for RFP support

Unified Call Center- Interdepartmental Team

- Common Council/City Clerk
- Mayor's Office
- Department of Administration
- Department of Public Works
- Department of Neighborhood Services
- Private Sector Expert

Response from Elected Officials in other Cities

- Barbara Johnson, Minneapolis Council President: *“The biggest benefit has been simplicity. As a Council Member, I can report problems immediately when driving around my district without having to think about who I need to call. The 311 operator can immediately direct me to the right people for problems that need to be addressed promptly (i.e., pot holes, junk cars, etc.). We have seen much quicker responses with easy to answer requests that don’t need to be transferred to other people as a result of 311. . . . The 311 system has definitely improved customer services in Minneapolis. Overall, I’m very pleased with the system. The citizens like it and have responded favorably to 311.”*
- Don Samuels, Ward 5, Minneapolis *“For me, the key benefit is the ability to have better accountability, which helps every department to improve its own efficiencies...we can track the path and development of the service and see where snags are...and it’s very objective.”*

Reference Slides

Call Metrics: 1-11-09 to 2-09-09

Name	Number of incoming calls	Answered calls	Abandon Calls	Avg Abandon Time	% in within 20 sec	Abandon Call %
Parking Enforcement	6,026	5,516	282	1:48	76	5%
Parking - Night Permissions	14,159	10,532	1,932	1:08	57	14%
DPW Call Center	14,307	10,202	647	:18	69	5%
City Hall Operator	5,826	4,272	1276	:41	54	22%
DPW Fleet Ops	8,760	1,875	1180	1:22	52	13%
Mayor's Office	1,692	1,396	162	:45	75	10%
Treasurer's Office	8,841	7,677	869	:22	75	10%
DNS Electrical Inspection	1,459	1,020	344	:044	58	24%
DNS Plumbing Inspection	1,199	954	119	:23	86	10%
DNS Complaints	2,979	2,155	310	:34	63	10%
DCD Permit Center	1,072	824	187	2:29	41	17%

Why Privatization Was Not Considered

- Need for call takers to be knowledgeable about current Milwaukee news and official city response
- Need for trust between field staff and call intake staff
- Need for close working relationship with Call Center Director and department heads for continuous improvement
- Labor contracts

Major Cities & Counties with 311 Service

Albuquerque

Austin

Baltimore

Charlotte-Mecklenburg

Chicago

Columbus (OH)

Dallas

DeKalb County

Denver

Detroit

Houston

Kansas City

Las Vegas

Los Angeles

Louisville

Miami/Miami-Dade

Minneapolis

New York City

Orange County (FL)

Sacramento

San Antonio

San Francisco

San Jose

Washington, DC