

Finance and Personnel Meeting – June 9, 2011

Agenda

- Overview
- Timeline/Implementation
- Technology (Lagan and Avaya)
- Resource Planning (forecasting, staffing, and reporting)
- UCC Location
- Personnel
- Training and Communication
- Citizen Satisfaction
- Future Plans

Unified Call Center - Primary Goals:

The United Call Center Initiative was created to consolidate existing Call Centers within city government with the goal of:

- Improving city service delivery for the betterment of citizens and the community.
- Reducing costs associated with funding and maintaining outdated legacy IT customer service systems (based on an enterprise approach).
- Providing the Mayor and Council with the ability to monitor service requests in real time and run regular reports to track staff/management performance.

Unified Call Center (UCC) “Implementation Plan”

Implementation

Long Term Opportunities

- Cost Savings
 - IVR/ strategic messaging
 - Agent efficiency
 - Performance standards
 - Schedule Adherence
 - Self Service – drive citizens to the use of web/IVR (customer service/cost savings)
 - Unified Staff (universal agents, supervision, building maintenance, etc.)
 - Process Improvement (inside/outside UCC) – savings and customer satisfaction
- First Call Resolution (cost savings and customer satisfaction)
 - Understanding/solving core reason for call
 - Asking secondary questions (that could prompt another call)
 - Citizen Education
- Improved Customer Service (more later)
- Real time data for UCC and field (Lagan and Avaya)
 - Identify potential issues early – rectify, staff to meet, or educate
 - Find efficiencies via data trending (seeing more calls regarding “x”)

Short Term Challenges (short list)

- Change management – many changes across organization
 - Personnel – learning Lagan system, added job knowledge, schedule adherence, performance standards, call quality monitoring, increased expectations, new co-workers (silos), new supervisors, new locations, etc.
- Training/Communication
- Understanding processes
- Others to be discussed further

Unified Call Center (UCC) "Implementation Plan"

Timeline (Wisely
Aggressive)

Timeline and Phases – SUMMARY!

- Phase I Assimilation -what can/can't do
- Phase II Existing Work Assessment/Call Monitoring/Develop UCC Draft Plan
- Phase III Continue Phase II, while refining recommendations and determining feasibility of draft plan implementation (phone technology, procedure reviews, site visits, DER, IT, etc)
- Phase IV Detailed planning/communication/implementation with key stakeholders (including work rule development, performance standard development performance forms, creating training/communication materials, IVR, IT, scripting, and utilizing Interdepartmental Process Development Team., etc.)
- Phase V Begin final implementation of UCC/Lagan assimilation– **Oct-Nov, 2011**
Includes Lagan completion and training of Lagan for 286-CITY and parking
Cross-train work to create universal agent
- Phase VI Complete UCC and merge staff (director, managers, supervisors, leads agents, and agents) **Nov-Dec 2011**
- Phase VII Incorporate citizen satisfaction components
Add self-service and IVR/in-queue messaging functionality
Incorporate call etiquette scripting and enforce call monitoring/coaching (including citizen satisfaction) and implement performance standards (call efficiency)
- Phase VIII 286-CITY ("311") Promotion
- Phase IX Develop reporting critical for AIM & other key initiatives
- Phase X Continue to build UCC & review/improve all processes/calls, while adding to UCC



Unified Call Center (UCC) "Implementation Plan"

Technology
(Lagan)

Technology (Lagan)

- Hardware/software installed
- Consolidate 286-city and Parking home grown systems to Lagan CRM
- Lagan self service online requests go live July/August timeframe
- Lagan agent training scheduled for September/October timeframe
- Process development in progress – Interdepartmental Process Development Team

Unified Call Center (UCC) "Implementation Plan"

Technology

Avaya (phone)

Technology – Avaya (Phone)

➤ IVR/Call Tree

- Previous system – multiple options/scripting
- The IVR sweet spot – avoiding the "0" opt out
- Recommendation: Very simple system, redirect common calls to correct areas, skills based routing.

➤ Up-front Messaging (eliminate call volume, educate, and satisfy)

- Standard – Welcome to the city; potential for slogan
- Specialized (emergencies)
 - Milwaukee branding (errant 286-CITY calls)
 - Groundhog Day storm – sanitation information

➤ In-Queue Messaging (eliminate call volume, educate. and satisfy)

- Standard (thank you for waiting)
- Specialized (emergencies) – H1N1 – symptoms, health information, etc.

➤ Virtual Hold – Satisfying citizens/maximizing agent time

➤ Outbound calling – call to warn or to explain (incredible citizen satisfaction tool) personal or blast call

- Prevent future calls and customer satisfaction ("WOW" factor)

Unified Call Center (UCC) "Implementation Plan"

Resource
Planning
(forecasting,
staffing, and
reporting)

Resource Planning (forecasting, staffing, and reporting)

- Current phone reporting – critical for staffing/performance decisions (more robust)
 - Reviewing 2012 Avaya upgrade and exploring alternatives for greater reporting
 - Knowing call types will help identify call seasonality, drive efficiency, and find areas of opportunity (low volume)
- "Just right" staffing – maintaining acceptable service levels while adding staff/work
 - 24x7 options - potential for limited services (ex. night parking) after hours (Minneapolis example)
- Procedures – combine intradepartmental procedures – take the best; discard the rest!
- No Workforce Management system – staple of call centers
 - Forecasting, staffing, and schedule adherence
 - Schedule adherence measurements (breaks/lunch optimization)
 - Potential alternatives - free version or low cost alternative

Unified Call Center (UCC) "Implementation Plan"

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Personnel

Personnel

- Phase I – combining 286-CITY and parking
 - Dispatching concerns (paperwork, radio, and proximity)
 - Unify maximum staff, without jeopardizing process (i.e. dispatching separate can be disjointed)
- Ideally, add more departments/workload
 - Customers – do not like transfers and prefer one stop shop
 - Efficiencies gained with universal agent
- STAFFING LEVELS – $WORKLOAD = TOTAL\ CALLS \times AVERAGE\ HANDLE\ TIME\ (AHT)$
 - AHT's increases
 - Lagan, new job responsibilities, and customer service additives learning curve
 - Later mitigated by FIRST CALL RESOLUTION, IVR, MESSAGING, PROCESS IMPROVEMENTS, SELF-SERVICE, REP EFFICIENCY, ETC.

Unified Call Center (UCC) "Implementation Plan"

Personnel

Personnel

- Personnel moves – most overlooked, misunderstood, and undervalued aspects of any project of this scope!!!
- Acclimation time/building relationships
 - Develop strong level of trust across all parts of the organization
 - Understand job difficulty (CALL AFTER CALL – CHALLENGING) – defend/educate misunderstood calls; zero tolerance for poor calls
 - Change management – cognizant of learning new Lagan system, added job knowledge, schedule adherence, performance standards, call quality monitoring, new co-workers (silos), new supervisors)
 - "In the Trenches" management
- New departmental fair work rules
 - Use past experience; effective policies from other city departments
 - Attainable performance standards, call monitoring, and schedule adherence goals at start; move toward industry standards
 - Avoid disenfranchising; allow everyone chance to succeed
 - Employee engagement – swapping , schedule adjustments , contests, etc. (improve employee engagement and drive agent efficiency)
 - Promote great work; progressive discipline plan for subpar performance

Unified Call Center (UCC) "Implementation Plan"

Unified Call
Center
Location

Unified Call Center Location

- Proposal for a modest UCC – 10th floor Municipal Building (budget team exploring possibilities)
- Cost Savings
 - Use existing center to save cost
 - Effective conservative space-maximizing design
 - Account for new department additions (also emergency space capacity)
 - Within the CH complex - optimal for communications/emergencies
 - Avoid two part move (costly and disruptive)
 - One call center – Less cost; less concern (avoids two site issues)
- Professional call center means
 - Better customer service (acoustics) for customers
 - Staffing – maximizing agent and management staffing in location (universal agent)
 - Unity (eliminate silos)
 - Improved employee engagement
- Will need to be relocated during construction. (Election Commission has been suggested)



Unified Call Center (UCC) "Implementation Plan"

Training and
Communication

Training and Communication

- Training of Lagan and job cross-training will be absolutely critical
 - Obstacles
 - No formal training/communication process
 - Job knowledge not all documented (develop training and knowledge from within)
 - Interdepartmental Process Development Team to provide insight along with experts within each call center division
- PHASED APPROACH
 - Train Lagan at current environment (13 days of training)
 - Cross train job knowledge as workgroups are combined
 - Have experts available – escalated calls/questions
- Communication – improve communication lines between the call center and other departments
 - Utilize designees from interdepartmental teams



Unified Call Center (UCC) "Implementation Plan"

Citizen
Satisfaction

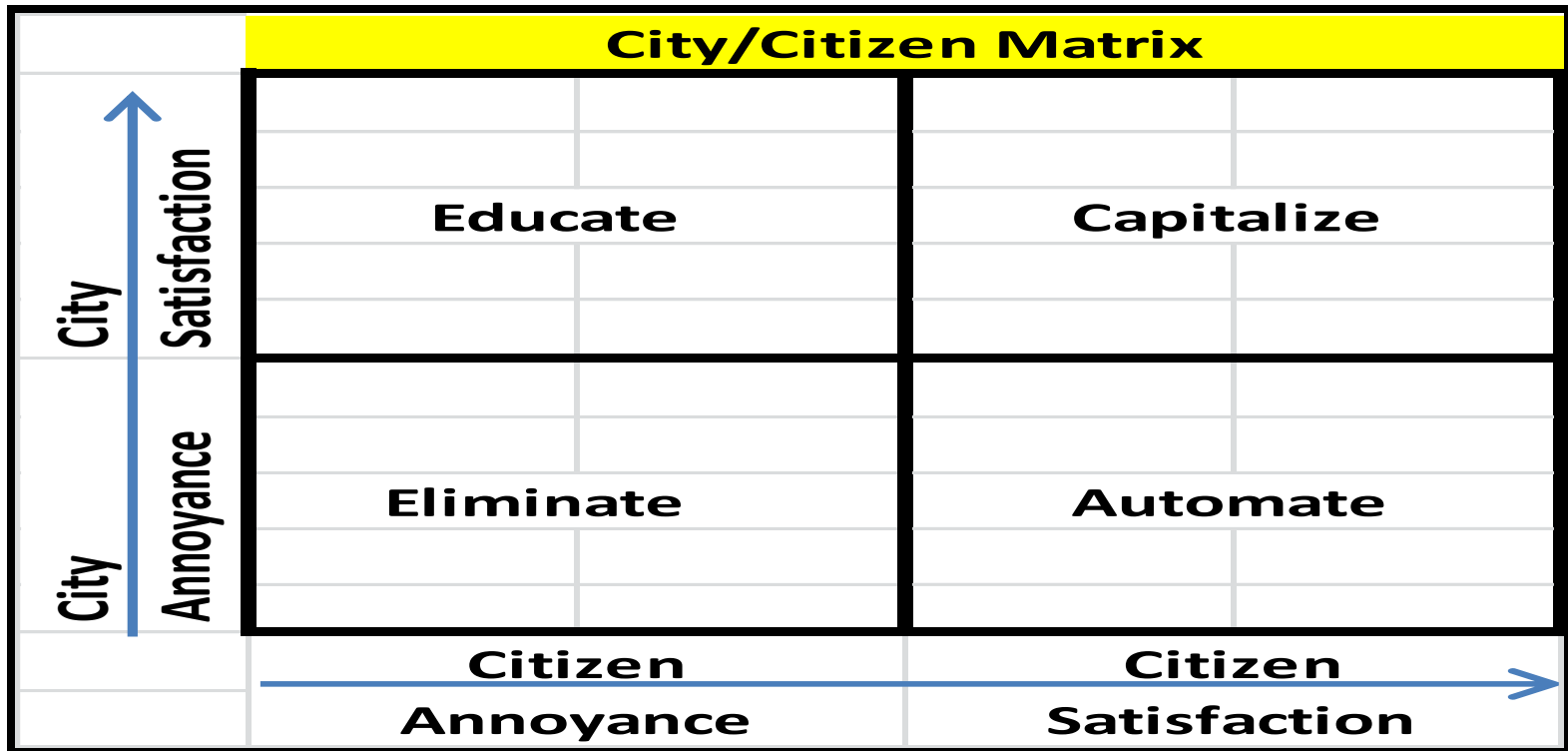
Citizen Satisfaction

- Greater citizen satisfaction means:
 - Less complaints to Mayor, Aldermen, Department Heads, Media, etc;
 - First call resolution translates into savings and customer satisfaction
 - Greater positive perception/promotion of city
 - Support of city projects/initiatives
 - UCC - less time spent on supervisor callbacks, escalations, etc.
- Many opportunities in this area
 - Treat with courtesy, empathy, and aim to educate
 - Can defend wrong perception of a call; cannot defend a bad call!
 - Challenges – changing personalities
 - Already in bloodstream
 - Track success via call monitoring, coaching, and surveying
- Consistent customer experience – every caller has same experience
 - Uniform customer satisfaction script/training could be used throughout the city)
- Citizen focus groups



Unified Call Center (UCC) "Turning Reds to Greens"

City/Citizen Matrix for improved processes and citizen satisfaction (good reporting will make this possible)



Unified Call Center (UCC) Sample Scripting

Opening

"Thank you for calling the City of Milwaukee, my name is 'x', how may I help you today?"

"I would be happy to help you. With whom am I speaking?"

"Information Only Request"

"Address Specific Request"

Library Hours

Pothole

Sanitation

Night Parking

No Initial address information will be requested unless call goes into a direction where an address would be necessary

"May I please have the street address of the pothole?"

"Just to verify, that address is 'x'"

"Thank you for bringing this to our attention; we really appreciate the information!"

Enter pothole into system and go to "closing" Also note if there is a service request (i.e. complaint)"

"What is the address you are calling about today?"

Call taker to resolve issue and go to "closing" Also note if there is a service request (i.e. complaint)"

"Just to verify, that address is 'x', correct"

Enter night parking information and go to "closing" Also note if there is a service request (i.e. complaint)"

"Thank you, (citizen name) I am operator number 'x', may I please have your location?"

"Thank you, may I please have your license plate number?"

"Just to verify, your license plate, that number is 'x', correct?"

"Thank you. Is that a state of Wisconsin license plate number?"

"How many nights will you need to park overnight?"

"Thank you (citizen name), please remember to park on the 'x' side of the street tonight "

Key:
 Green Box = Scripting
 Blue Box = Type of requests
 Yellow = call taker actions (requiring nothing verbal to the citizen)

Closing

Closing: "Is there anything else I can help you with today?"

If "yes"

If "no"

"Certainly, I would be happy to help you further"

"It has been my pleasure assisting you today. Thank you for calling the City of Milwaukee"

End of call wrap-up. Call taker will enter any final notes and complete any necessary follow-up



Unified Call Center (UCC) "Implementation Plan"

Further Plans

- 286-CITY Promotion (311)
- Emergency Planning
- Continue to update and implement living document