Montgomery County 311
Interim Performance Review

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Director Public Information Office

November 5th, 2010

CountyStat

CountyStat Principles

- **Require Data-Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**

Agenda

- **MC311 Basics**
- **311 System Benchmark Comparison**
- **MC311 Customer Service Center Utilization**
- **MC311 Reflections on Operational Issues**
- **MC311 Performance Measurement**
- **MC311 Service Request Generation**
- **CountyStat Performance Measurement of Departmental Service Request Fulfillment**
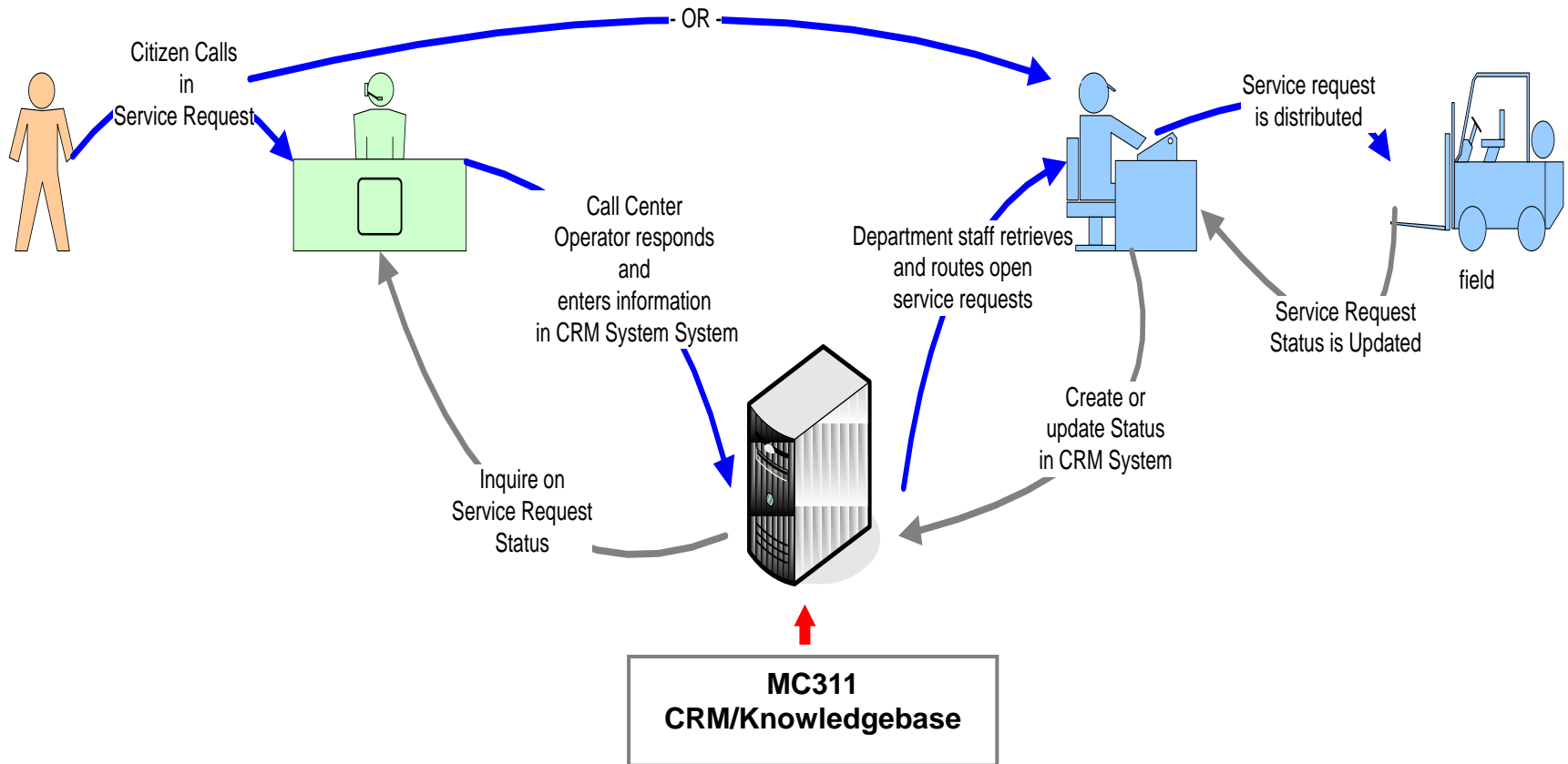- **Discussion of Initial MC311 Customer Survey Data**

MC311 Basics: System Overview

- **Launch Date:**
  - June 17th 2010

- **Call Center Operating Hours:**
  - Monday through Friday 7:00 am to 5:00 pm

- **Call Center Staffing:**
  - 49 Customer Service Representatives (CSRs)
    - 28 County positions
    - 21 temporary service employees
      - Recruiting for 8 vacant positions, hope to have filled by late November
      - Will reduce temporary service complement to maintain minimum staffing level
  - 4 County Supervisors, 1 Contractual Functional Consultant
  - 1 Manager, 1 Director

- **MC311 Web Portal:**
  - 24/7 web access to access information, create a request for service an check on the status of an existing service request

> **Montgomery County was the first 311 system in the nation to roll out a 311 web portal simultaneously with the launch of its call center**

MC311 Basics: Process Flow Diagram

Citizen Calls in Service Request

- OR -

Call Center Operator responds and enters information in CRM System System

Service request is distributed

field

Department staff retrieves and routes open service requests

Service Request Status is Updated

Create or update Status in CRM System

Inquire on Service Request Status

MC311 CRM/Knowledgebase

There are typically four types of calls to MC311: information requests, service requests, referrals, and complaints/feedback/opinions

311 System Benchmark Comparison:
Public Technology Institute (PTI) Citizen-Engaged Communities

Jurisdiction	Population Category	Phone Number Type	Staffing Complement	2009 Call Volume	Operating Hours	Initial Launch
Hampton, VA	75,001-150,000	Central 311; seven-digit number; special cell number	10-20 full time call reps 1-2 full-time supervisors	250,000 calls	M-F 7:00 AM.-11:00 PM Urgent 24x7x365	Sep-99
Buffalo, NY	150,001-300,000	Central 311; seven-digit number; special cell number	6-10 full time call reps 1-2 full-time supervisors	288,962 calls	M-F 8:00 AM-4:30 PM	Jul-08
Corpus Christi, TX		Central seven-digit number	10-20 full time call reps 3-5 full-time supervisors	400,000 calls	M-F 7:00 AM-7:00 PM	2004
Greensboro, NC		Central seven-digit number	10-20 full time call reps 1-2 full-time supervisors	265,000 calls	M-F 7:00 AM-6:00 PM	Jul-04
Winston Salem, NC		Central 311; seven-digit number; special cell number	20-40 full time call reps 1-2 full-time supervisors	208,974 calls	24x7x365	Jul-07

PTI designated nine local governments from across the U.S. as "Citizen-Engaged Communities" for their efforts to provide the public with multi-channel access to government services and information.

311 System Benchmark Comparison:
Public Technology Institute (PTI) Citizen-Engaged Communities

| Jurisdiction	Population Category	Phone Number Type	Staffing Complement	2009 Call Volume	Operating Hours	Initial Launch
Miami-Dade County, FL		Central 311; seven-digit number		2,642,968 calls	M-F 6 AM-10 PM and on Sat. 8 AM-5 PM	Jun-05
New York, NY		Central 311		18,700,000 calls	24x7x365	Mar-03
Philadelphia, PA	301,001 or more	Central 311; seven-digit number	More than 41 full time call representatives and 6-10 full-time supervisors	1,200,000 calls	M-F 8 AM-8 PM and Sat. 9 AM-5 PM	Dec-08
San Francisco, CA		Central 311; special cell number		3,090,133 calls	24x7x365	Feb-07
Montgomery County, MD		Central 311; seven-digit number		621,420 Calls (2010 Projected)	M-F 7:00 AM-5:00 PM	Jun-10

Compared to other jurisdictions of similar size, Montgomery County has more limited operating hours and projects to have much lower call volume

MC311 Customer Service Center Utilization:
Customer Service Center Call Volume Since Official Launch

MC311 averaged 12,209 calls a week, or 2,391 calls a day, since official launch
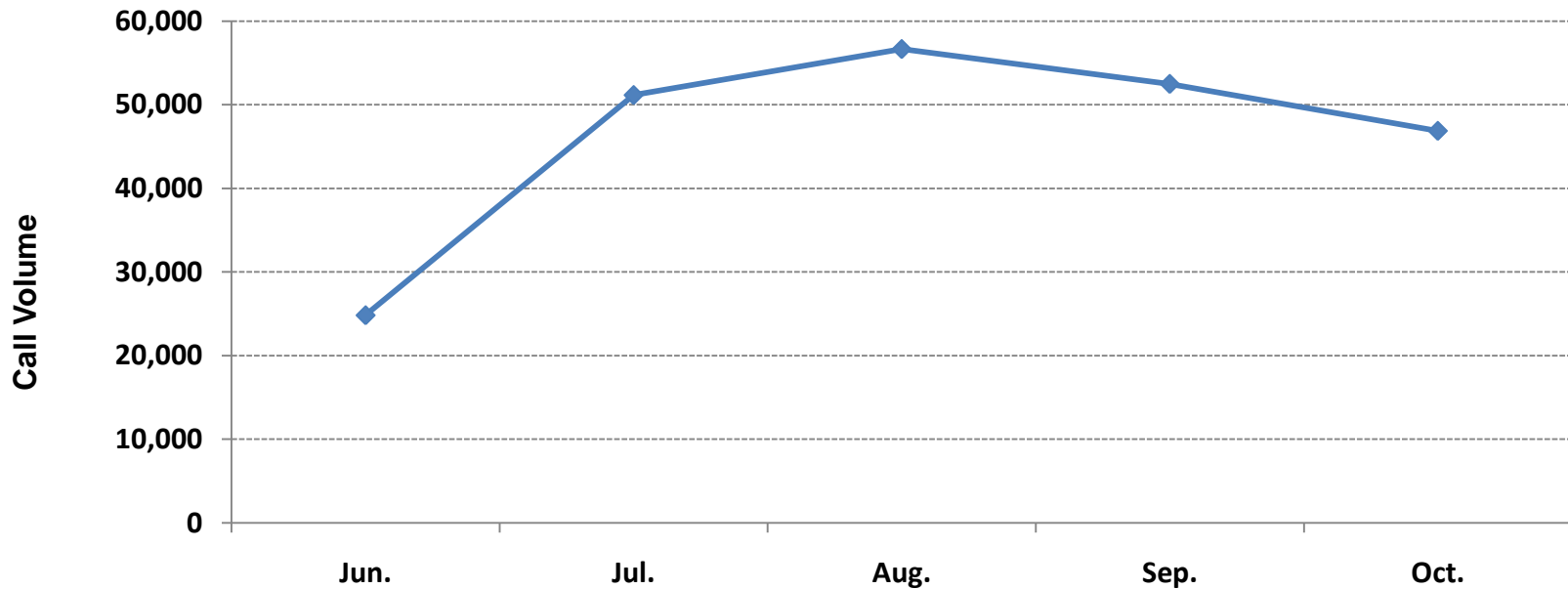
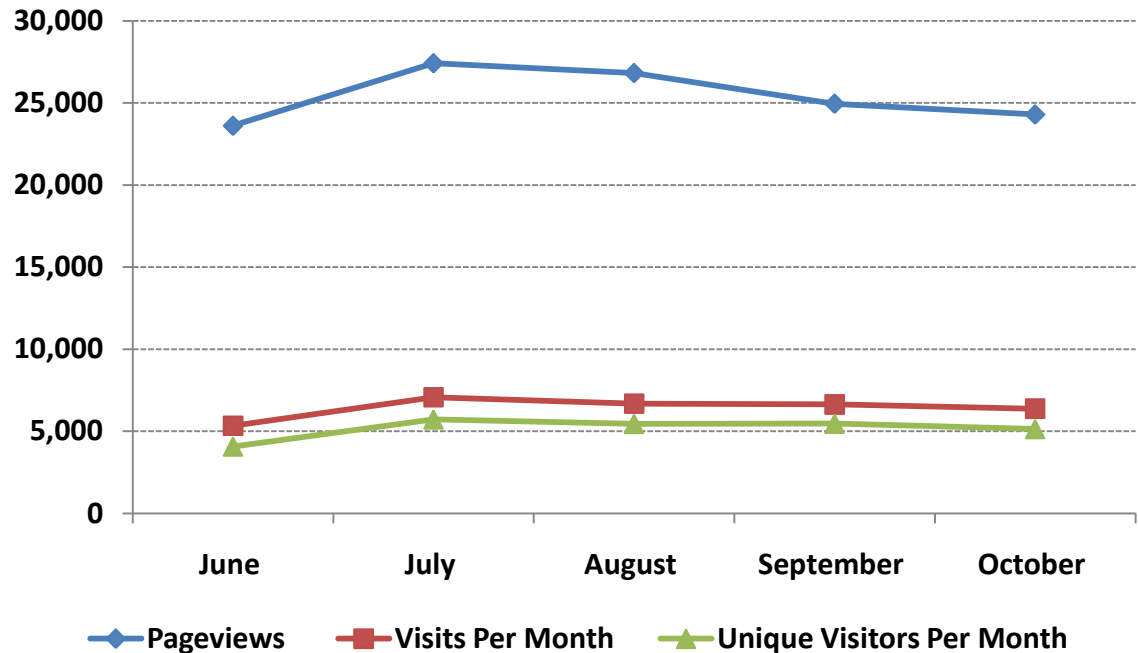| June *	July	August	September	October
24,832	51,147	56,646	52,480	46,868

* Partial Month of Official Launch

MC311 Customer Service Center Utilization:
Web Portal Utilization Metrics Since Launch

Since the official MC311 launch, utilization of the self-service web portal, which allows residents to seek out answers and check on the status of service requests, has remained consistent.
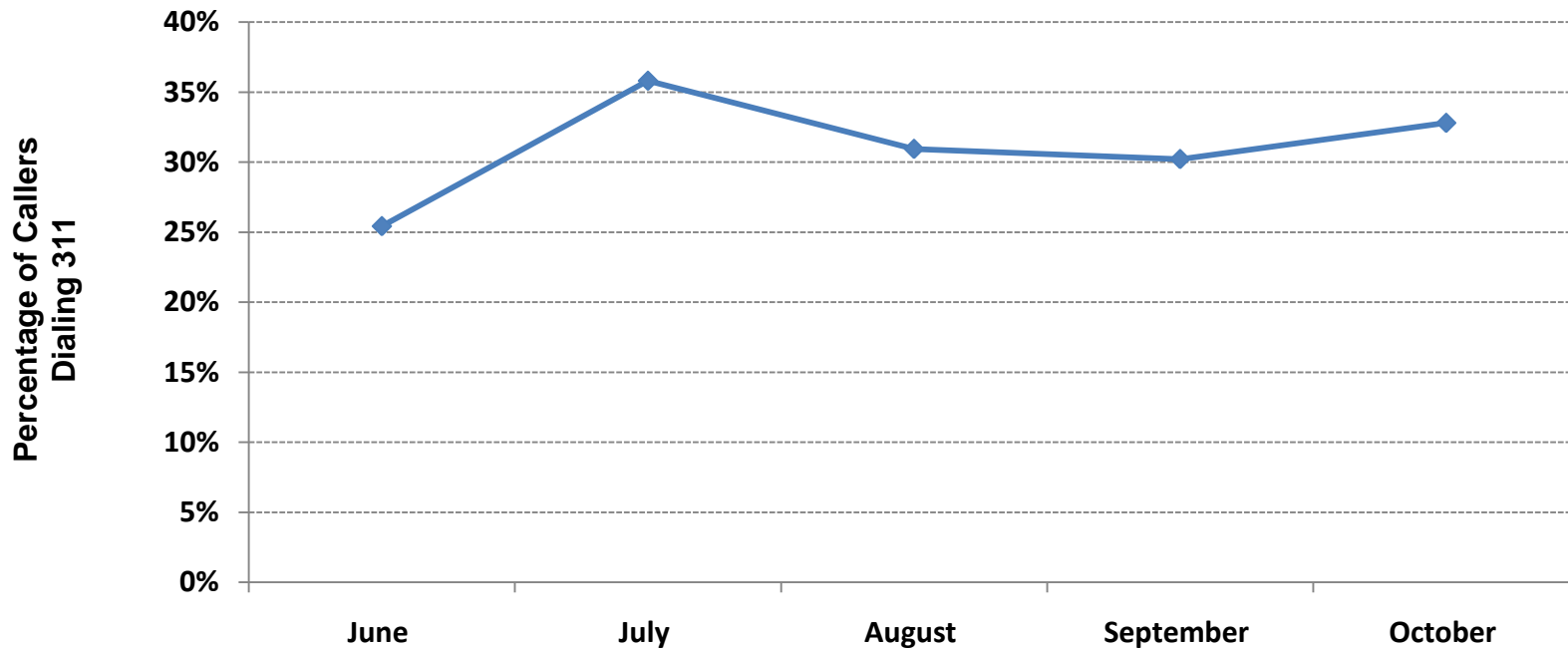

Initiative	Category	June *	July	August	September	October
Self-Service	Page views	23,610	27,417	26,820	24,954	24,296
	Visits Per Month	5,331	7,073	6,674	6,631	6,374
	Unique Visitors Per Month	4,075	5,728	5,458	5,465	5,140

* Partial Month of Official Launch

MC311 Customer Service Center Utilization:
Percentage of Customers Dialing "311"

Month	June *	July	August	September	October
Dialing "311"	6,314	18,319	17,531	15,860	15,376
Total Call Center Volume	24,832	51,147	56,646	52,480	46,868
% to 311	25%	36%	31%	30%	33%

* Partial Month of Official Launch

MC311 Customer Service Center Utilization:
Performance Metrics Defined

Category	Definition
Call Volume	Total # of calls that come in to the phone lines
Call Answer Rate (Average)	Average % of calls that that come into the switch and are answered by a CSR
Abandoned Call Rate (Average)	Average % of calls that come into the switch, but are not answered by a CSR
Scheduled Customer Service Representatives (CSRs)	Total number of CSRs that are scheduled to work on any given day
Actual CSRs	Total number of CSRs who are present and logged into the system
Occupancy Hours (Average)	Average number of hours that a CSR is either taking calls, in after call work or available to take calls.
Average Speed to Answer	Average amount of time it takes to reach a CSR after the Welcome announcement
Average Hold Time	Average amount of time a customer is put on hold during a call
Average Handle Time	Average time it takes a CSR to speak with a customer per call
Average After Call Work	Average Time CSR taking after speaking to a customer before becoming available to work per call
Total Service Requests Generated	Total number of Service Requests created in the MC311 CRM system by a CSR
Accuracy Rate	Actual rate of Service Requests with no errors according to stated standards

MC311 Customer Service Center Performance:
Service Level and Call Handling Performance Metrics

Initiative	Category	Goal	June *	July	August	September	October
Service Level	Call Volume	N/A	24,832	51,147	56,646	52,480	46,868
	Call Answer Rate (Average)	95%	97.96%	97.48%	98.07%	97.68%	98.00%
	Abandoned Call Rate (Average)	5%	2.04%	2.52%	1.93%	2.22%	2.32%

Initiative	Category	Goal	June *	July	August	September	October
Call Handling	Average Speed to Answer	0:20	0:14	0:15	0:13	0:11	0:09
	Average Hold Time	0:30	0:43	0:43	0:43	0:46	0:45
	Average Handle Time	2:30	3:17	3:08	3:09	3:06	3:07
	Average After Call Work	1:30	1:20	1:19	1:14	1:15	1:12

* Partial Month of Official Launch

Pew Trusts Comparison of Call Handling Performance

On March 2, 2010, The Pew Charitable Trusts published "*A Work in Progress: Philadelphia's 311 System After One Year*" which compared call center performance metrics from 15 jurisdictions.

	Avg. Handling Time	Avg. Wait Time	Avg. % Calls Abandoned	Avg. % of Calls Transferred
Benchmark Median	123 Seconds	32 Seconds	11.50%	18.60%
Montgomery County	189 Seconds	12 Seconds	2.21 %	N/A

MC311 does not currently report on the percentage of calls transferred to other departments on a regular basis.
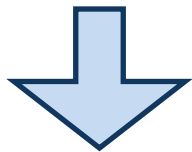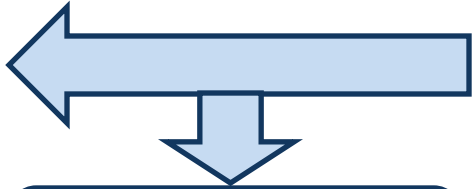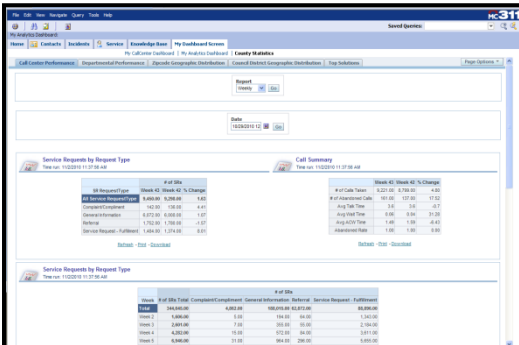
CountyStat

MC311 Customer Service Center Performance:
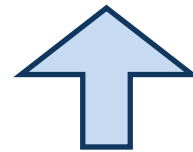## CountyStat Performance Dashboard Tracking Process

MC311 Operations

Executive Decision Making

Departmental Operations

MC311 Dashboard

CAO Report Creation
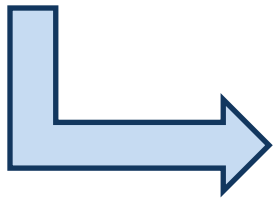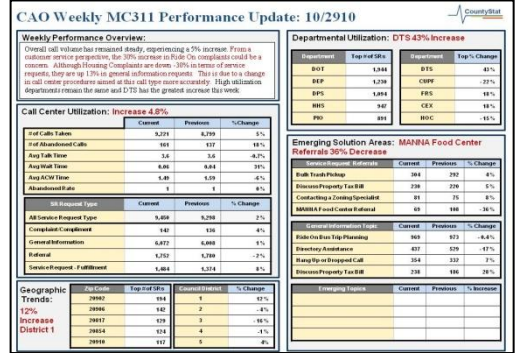
CountyStat Analysis

CAO Weekly MC311 Performance Update: 10/29/10

CountyStat

Weekly Performance Overview:

Overall call volume has remained steady, experiencing a 5% increase. Call volumes in the first and third Council Districts experienced the largest change. From a customer service standpoint, the largest solution area increase was in flu clinic appointment requests with a 69% increase. High utilization departments remain the same and DTS has the greatest increase this week. CUPF has experienced a notable 22% decline in service requests.

Departmental Utilization: DTS 43% Increase

Department	Top # of SRs
DOT	1,945
DEP	1,230
DPS	1,095
HHS	947
PIO	891

Department	Top % Change
DTS	43 %
CUPF	- 22 %
SHF	20 %
CEX	18 %
FRS	17 %

Call Center Utilization: Increase 4.8%

	Current	Previous	%Change
# of Calls Taken	9,221	8,799	5 %
# of Abandoned Calls	161	137	18 %
Avg Talk Time	3.6	3.6	-0.7%
Avg Wait Time	0.06	0.04	31%
Avg ACW Time	1.49	1.59	-6 %
Abandoned Rate	1	1	0 %

SR Request Type	Current	Previous	% Change
All Service Request Type	9,450	9,298	2 %
Complaint/Compliment	142	136	4 %
General Information	6,072	6,008	1 %
Referral	1,752	1,780	- 2 %
Service Request - Fulfillment	1,484	1,374	8 %

Emerging Solution Areas: Flu Clinic Appointment 69% Increase

Solution Area	Current	Previous	% Change
Ride On bus trip planning/location/status/scheduled arrival time	1030	1041	-1%
Bulk trash pickup	567	523	8%
Requests to discuss property tax bill	490	423	16%
Directory Assistance	455	549	-17%
Hang Up or Dropped Call	358	334	7%
MANNA Food Center Referral	222	212	5%
Schedule DPS Building Construction Related Permitting Inspections	171	164	4%
Flu Clinic Appointment	132	78	69%
Contacting a Zoning Specialist	128	121	6%
Building & Construction Services	112	100	12%

Geographic Trends:

12% Increase District 1

Zip Code	Top # of SRs
20902	194
20906	142
20817	129
20854	124
20910	117

Council District	% Change
1	12 %
2	- 4 %
3	- 15%
4	-1 %
5	4%

MC311 Customer Service Center Performance:
Occupancy/ Internal Operations Performance Metrics

Initiative	Category	Goal	June *	July	August	September	October
Occupancy	Scheduled Customer Service Representatives (CSRs)	N/A	500	1131	1106	1092	1004
	Actual CSRs	N/A	459	1056	1047	984	973
	CSR Attendance Rate	N/A	91.8 %	93.4 %	94.7 %	90.1 %	96.9 %
	Occupancy Hours (Average)	7.5	6:33:52	5:40:59	7:27:32	7:33:58	7:24:47

MC311 has identified a number of staffing lessons learned that will guide future operations.

All averages are weighted. Occupancy hours are adjusted to remove scheduled and unscheduled break time.

* Partial Month of Official Launch

CountyStat

MC311 Reflections on Internal Operations

- **What is your overall perception of operations since launch?**
  - Consistently met performance goals and have established sound business processes for continual improvement.
  - While some employees continued to be dissatisfied with the involuntary transfer to MC311, many have made a strong commitment to the program and are high performers.

- **What lessons have you learned?**
  - Managing customer's expectations – would have been better to let customers know they would be reaching 311 when they dialed certain department numbers
  - Importance of having clear closely managed performance expectations
  - Importance of refining information in the CRM database to make easier to utilize during a call
  - Getting a better understanding of minimum staffing level on impact on scheduling of customer service representatives

Slide Content: MC311

MC311 Reflections on Internal Operations

- **What are the major successes?**
  - Customers have a single point of entry for County Government information or requests for service
  - Live person answers every call, no voicemail
  - Approximately $10.3 million in savings have already been identified from implementing this initiative by centralizing call taking and customer service functions and eliminating positions in departments
  - Significant improvement in performance through training and coaching of supervisory staff resulted in meeting or exceeding most performance goals within first four months after launch
  - Productivity enhancements that include taking down DOT SR system, phasing out of Department emails and Department system cross training
  - Launch of the portal coincides with launch of Customer Service Center
  - Developing in-house training capacity with the creation of new Training Specialist position and Training Assistant (using existing positions)
  - Developing the infrastructure (technology and facility) to provide ability to quickly up-staff in support of Public Health and Safety emergency response
  - Using County's Temporary Services Contracts as a resource to up-staff for expected peaks in call volume

Slide Content: MC311

MC311 Reflections on Internal Operations

- **What are major challenges and areas for improvement?**
  - Developing and administering ongoing CSR training while maintaining phone coverage
  - Working with departments to assure information is kept current and accurate and to notify call center of department events that will impact call volume
  - Continually monitoring calls to assure accurate information is provided
  - Human Resources issues related to the transfer of consolidated employees
  - Mitigating impact of Tier 2 transfers, greater emphasis on first call resolution through cross training
  - "Call 311 to Get it Done" impression that 311 is responsible for fulfillment of services rather than just information and intake
  - Ongoing requirement for additional telecom expertise and resourcing
  - Highly structured and monitored environment unique to County employees

MC311 Reflections on Internal Operations

- **What are major challenges and areas for improvement?**
  - Managing customer complaint response and resolution, where possible, in a more timely manner with limited resources
  - Impacts of call center consolidation through forced transfer on personnel performance, satisfaction, and morale
  - SR tracking systems – when is a Service Request closed?
  - Effectively managing a unique highly structured operation within County government while maintaining a productive relationship with union membership and leadership
  - Clarifying SLAs for customers
  - Measuring SLA performance by departments and closing the loop for customers
  - Getting the word out about 311 to residents of Montgomery County
  - Handling and tracking of non-English calls
  - OHR calls, should internal customers be participating?

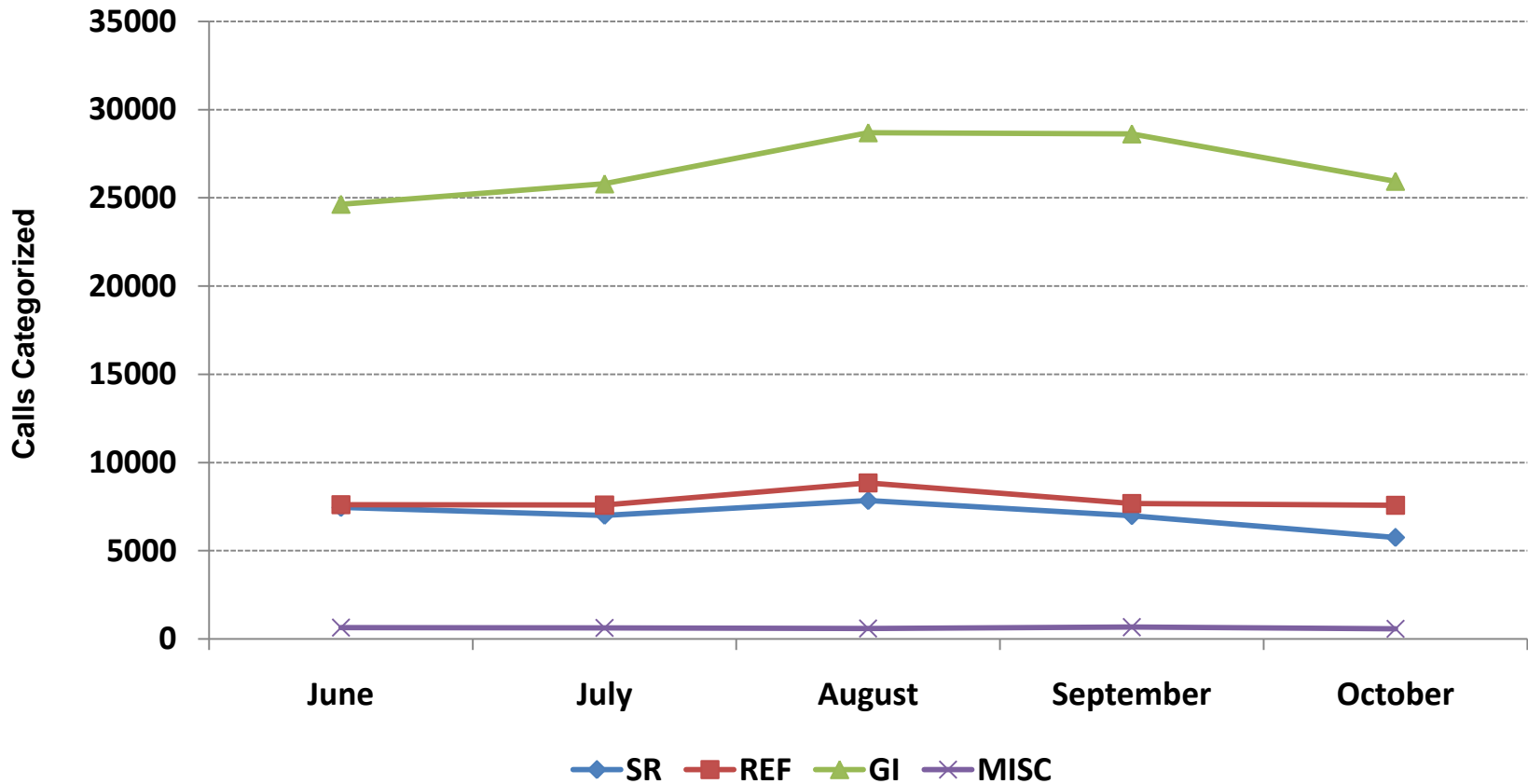# MC311 Customer Service Center Call Types:
Categorizing Call Intake

A Service Request in MC311 is simply a record that is created when a resident contacts the 311 Call Center requesting service. (A service request can also be created in the back office by a department.)

The types of MC311 calls that will be fielded in the Call Intake process can be categorized as follows:

▪**General Information (GI):** These calls typically constitute 50% of a Customer Service Center's calls and deal with responses to Frequently Asked Questions (FAQs); provide static information about policies and procedures, County government events, and operations

▪ **Referrals (REF):** These calls typically constitute 25% of a Customer Service Center's calls and provide constituents with the telephone number for a call requiring "subject matter expertise" and perform a "warm transfer" of the call, if required

▪**Service Requests (SRs):** These calls typically constitute 20% of a Customer Service Center's calls. A service request is created for a department to fulfill a resident's request.

▪ **Miscellaneous Comments / Compliments / Complaints:** These calls typically constitute 5% of a Customer Service Center's calls and typically document the nature of the comment, compliment, or complaint and are visible to the specific department.

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MC311 Customer Service Center Call Types:
Intake Category Statistics

MC311 Customer Service Center Performance:
Call Center Service Request Performance Metrics

> **Situations that will cause the number of service requests to be less than the number of calls taken:**
> ▪ Call is dropped or caller hangs up after reaching a CSR
> ▪ Caller is checking on the status of an existing service request
> ▪ Call is an actual emergency and transferred immediately to 911

| Initiative	Category	Goal	June *	July	August	September	October
Production	Total Service Requests Generated	N/A	19,961	41,029	48,080	45,803	42,007
	Accuracy Rate	98%	96.56%	96.31%	97.92%	98.90%	99.54%

> **"Accuracy Rate" is defined by MC311 as: actual rate of Service Requests with no errors according to stated standards**

* Partial Month of Official Launch

MC311 Service Requests Generated

MC311 averaged 10,362 service requests a week or 2,030 service requests a day since launch
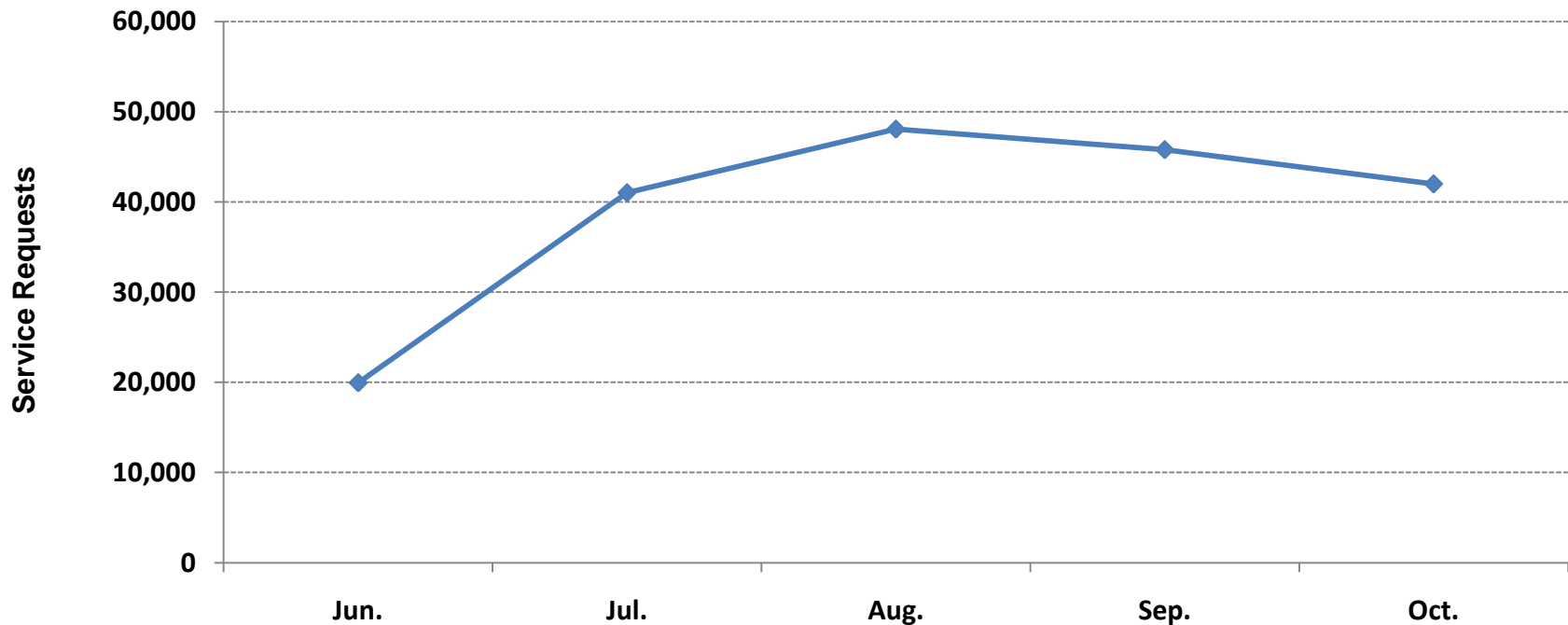
June *	July	August	September	October
19,961	41,029	48,080	45,803	42,007

* Partial Month of Official Launch

CountyStat

MC311 Customer Service Center :
Top 10 Types of Calls for Information (June 17 -October)

Solution Name	Number of Service Requests
Ride On bus trip planning/location/status/scheduled arrival time	17,473
Directory Assistance	11,209
Hang Up or Dropped Call	3,783
Non-MCG Solution Not Found	2,443
Requests to discuss property tax bill	2,389
Bulk trash pickup	2,376
Schedule DPS Building Construction Related Permitting Inspections	2,294
Requests to discuss property tax bill/assessment/credits	2,090
Name and telephone number of DPS building inspector	1,678
Information printed on the tax bill	1,517

MC311 Customer Service Center :
Top 10 Types of Department Service Fulfillment Requests (June 17 -October)

Solution Name	Number of Service Requests
Bulk trash pickup	2,891
Landlord Tenant (LT) complaints, disputes or issues	1,226
Disposal or recycling of scrap metal	1,071
Housing Complaints	966
Dead County Tree	703
Ride On bus trip planning/location/status/scheduled arrival time	699
Request to Inspect or Prune County tree	687
Order a recycling bin, can or wheeled cart	685
Tree down in roadway	577
Ride On complaint - Service	575

MC311 Customer Service Center :
Top 10 Types of Referrals (June 17 -October)

Solution Name	Number of Service Requests
Bulk trash pickup	6,711
Requests to discuss property tax bill	3,220
Requests to discuss property tax bill/assessment/credits	2,643
Disposal or recycling of scrap metal	1,509
Order a recycling bin, can or wheeled cart	1,287
MANNA Food Center	1,103
Contacting a Zoning Specialist	921
Information on the building codes applicable to a specific project	536
Personal Property Tax Billing	483
Building & Construction Services	479

MC311 Customer Service Center :
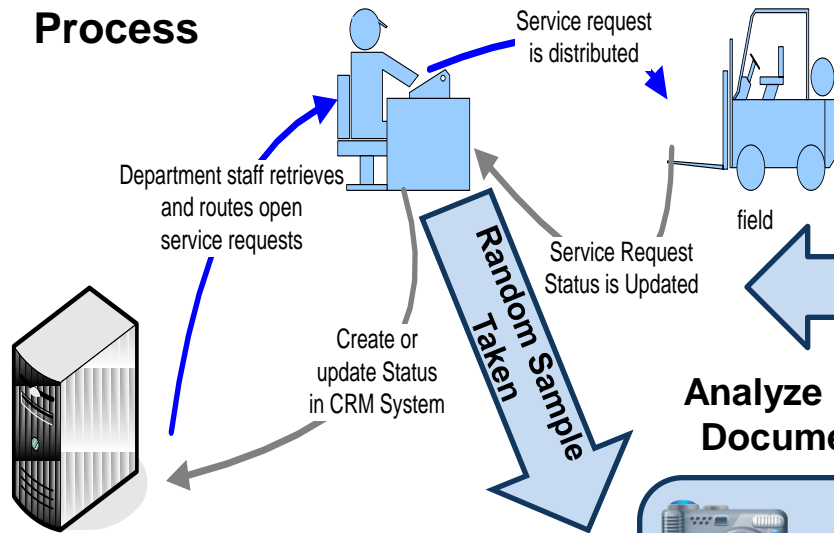## Top 10 Types of Complaints (June 17-October)

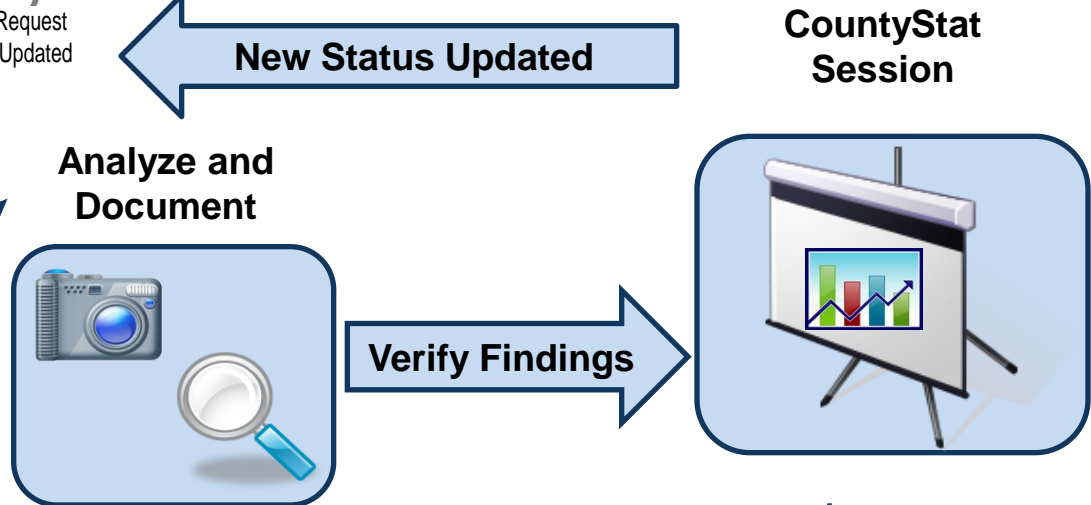| Solution Name	Number of Service Requests
Ride On complaint - Service	999
Ride On complaint - Driver Behavior	453
Housing Complaints	128
Landlord Tenant (LT) complaints, disputes or issues	65
Ride On bus trip planning/location/status/scheduled arrival time	54
Cable Complaints	52
Ride On complaint - Other, Miscellaneous, Passenger injury, Kids Ride Free	45
Tall grass on private property	44
File Complaint with Department of Permitting Services (DPS)	43
Customer complaints for the County Executive	42

CountyStat Service Request Verification Process

Starting in January 2011, CountyStat will conduct a random sampling of completed service requests, manually verify that request is completed, and hold CountyStat session with representative department(s) to discuss results of the verification analysis

Current MC311 Process

Service request is distributed

Department staff retrieves and routes open service requests

Service Request Status is Updated

field

Create or update Status in CRM System

Random Sample Taken

CountyStat Service Request Verification Process

New Status Updated

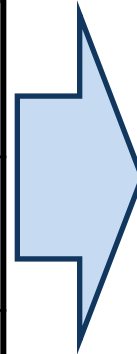**CountyStat Session**

Analyze and Document

Verify Findings

CountyStat Departmental Performance Measurement:
Example – Time to Complete Service Request Fulfillment

Department ABC's Service Requests		

	SLA Time to Complete	Actual Time to Complete	Within SLA Timeframe
Service Request A	3 days	4 days	No
Service Request B	5 days	5 days	Yes
Service Request C	4 days	3 days	Yes

Department ABC's Service Request Closure Performance

67% of Department ABC's Service Requests are Closed within the Service Level Agreement (SLA) Timeframe

CountyStat will calculate the percentage of total Department service requests (SRs) that are completed within the Service Level Agreement (SLA) and audit a random sampling of service requests to ensure departments accurately record SR closures

CountyStat Departmental Performance Measurement:
Example – Confirmation of Service Request Fulfillment

Random Sample of Department ABC's Service Requests

Department ABC's Service Request Closure Accuracy Rate

	Marked Complete by Department	Verified Complete by CountyStat
Service Request A	Yes	No
Service Request T	No	Yes
Service Request Z	Yes	Yes

33% of Department ABC's Service Requests are Accurately Closed and Recorded

CountyStat will conduct a random sampling of service requests visually verify service request completion to ensure departments accurately record SR closures

Discussion of Initial MC311 Customer Survey Data

- **Dates Administered**: 10/4/10- 10/15/10

- **Distribution Method:** Email

- **Population Included:** Any MC311 Customer Who Provided an Email Address Between 8/15 – 9/15

- **Next Survey Administration:** Early December

Final Survey Completion Statistics - 09/30/2010	Total	Percent
Population Sent To:	2,097	N/A
Less Email Bounces:	173	8.2%
Population Receiving Survey Email:	1,924	91.8%
Total Responses (includes Opt Outs):	**367**	**19.07%**
Request Opt Outs:	27	1.40%

MC311 will continue to conduct customer service satisfaction surveys on a quarterly basis that will serve for the basis of comparative analysis and guide operational decision making practices

Discussion of Initial MC311 Customer Survey Data:
MC311 Customer Self Identification Variables

How many times in the past month did you contact the MC311 Customer Service Center by either dialing 311, 240-777-0311 or one of the 26 other department numbers that now come to 311?

	Response Percent	Response Count
Once	55.3%	203
Between 2-5	37.1%	136
Between 6-10	4.1%	15
Greater Than 10	0.8%	3
Don't Know	2.7%	10

Regarding your most recent call, what was the purpose of the call?

	Response Percent	Response Count
Ask a Question	34.9%	128
Report a Problem	28.1%	103
Request Services	28.3%	104
Compliment/Complaint	5.4%	20
Other	3.3%	12

Survey participants represented a fairly even sampling of callers looking for answers to questions, reporting problems, or requesting service.

Discussion of Initial MC311 Customer Survey Data:
MC311 Customer Satisfaction

Please rate your level of satisfaction with the following for your most recent contact to the MC311 Customer Service Center:						
	Extremely Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Extremely Dissatisfied	Response Count
The time it took to reach a representative	38%	39%	10%	6%	7%	366
The handling of your call	41%	31%	9%	8%	11%	349
Your overall experience during the call	40%	31%	9%	9%	11%	349

71% of the survey participants rated their overall MC311 experience during the call as satisfactory or better.

Discussion of Initial MC311 Customer Survey Data:
MC311 Call Service Representative Ratings

Was the Customer Service Representative able to resolve your issue without transferring the phone call?

	Response Percent	Response Count
Yes	42.5%	156
No	43.3%	159
Not Sure	14.2%	52

Was the person that you were directed to able to resolve your issue?

	Response Percent	Response Count
Yes	41.8%	66
No	47.5%	75
Not Sure	10.8%	17

Whether their call was handled directly by the first representative or transferred to another service representative, 60% of the call takers had their problem resolved and 20% did not.

Wrap-Up and Follow-Up Items