



**ADMINISTRATIVE PROCEDURES**

<b>TITLE: Customer Service Program</b>		<b>PROCEDURE #: 211-A</b>
<b>DEPT: Board of Commissioners</b>		<b>DIVISION: N/A</b>
<b>EFFECTIVE DATE: 01/07</b>	<b>REVIEWED:</b>	<b>REVISED: 12/12</b>

**OBJECTIVE:** To establish a procedure to carry out the uniform countywide customer service program.

**REFERENCE:** Policy # 211

**POLICY STATEMENT:** To deliver quality products and services in a timely, feasible and cost effective manner that meet our customers’ expectations, through well- defined customer service program standards and training that support county values and assist employees in program implementation.

**APPLICABILITY:** All county departments and employees.

**PROCEDURES:** Marion County has developed a customer service program that consists of standards that all county employees/volunteers are expected to follow. County employees will be trained on the new standards, and customer service will be part of all Marion County employees’ annual performance appraisal/evaluations. A customer service database, Citizen Relationship Management (CRM), was established for county departments. The following pages detail the components of Marion County’s customer service program.

**DEFINITIONS:**

**Customers:** County employees, volunteers, individuals, groups or organizations who receive or request a product or service from the county.

**Customer Service:** The process of delivering efficient, fair, cost effective and satisfying products and services with the goal of meeting the customer’s needs.

**Customer Service Program Standards:** A set of standards for county employees and volunteers to follow when providing services to customers includes expectations regarding employee/volunteer conduct when dealing with customers over the phone, e-mail, face-to-face, other written correspondence, and at meetings.

Guiding Principles: Refer to Policy # 211 Customer Service Program, Value Statements, *page 211.2.*

COMPONENTS OF THE MARION COUNTY CUSTOMER SERVICE PROGRAM:

1. Marion County Customer Service Program Standards
2. Employee Accountability & Department Head Performance Appraisal
3. Citizen Relationship Management (Constituent Services Tracking Database)
4. Department Surveys to Measure Customer Satisfaction

1. Marion County Customer Service Program Standards

1.1. All county employees and volunteers must be familiar with the Marion County Customer Service Program Standards. The Standards consist of the following topics. Details behind each topic can be found in Attachment A:

1.1.1. Guiding Principles of Marion County's Customer Standards

1.1.2. Telephone/Voicemail Protocols

1.1.3. County Meeting Protocols

1.1.4. Written Correspondence

1.1.5. E-Mail Protocols

1.1.6. Working Directly with Customers

2. Employee Accountability & Department Head Performance Review

To ensure that all county employees are complying with the Marion County Customer Service Program Standards, as part of their annual performance review all county employees including department heads will be evaluated on customer service.

3. Citizen Relationship Management (CRM)/Constituent Service Requests Tracking Database

3.1. A customer service information system (CRM) will assist county departments with the development of an automated, central repository for the logging of constituent complaints or requests for service, as well as enable departments to set more customized targets and standards for their customer service. Required system usage is for complaints tracking only.

3.2. The system will facilitate message delegation and routing, as well as allow for the tracking of an inquiry from the point it is entered into the system up to the point where it is resolved. A complaint is considered resolved when the customer understands what action will or will not be taken.

3.3. The system consists of software that will be installed in county departments at key locations as designated by the department head. County employees using the CRM will receive training.

#### 3.4. Definitions

3.4.1. Complaint: A complaint is defined as any written or verbal communication from a customer expressing dissatisfaction with a service provided or action taken by Marion County that is beyond the scope of standard department operations or into which further investigation is required. In addition, requests that are out of the ordinary and requests that seek a change in county services or policies should also be logged.

3.4.2. Resolution: A complaint is considered resolved when the constituent understands what action will or will not be taken. If no action will be taken, the constituent will be advised why and what other resources may be available.

3.4.3. Public Record: A public record contains information relating to the conduct of the public's business and prepared, owned, used or retained by a public body, regardless of the physical form or characteristics.

#### 3.5. Procedures

3.5.1. Any employee can receive a customer complaint and therefore needs to understand this procedure for acting on complaints.

3.5.2. Department staff are encouraged to resolve issues and concerns that are within their job responsibilities and can be easily resolved as they come to their attention.

3.5.3. Complaints can be received by telephone, e-mail, written letters, or verbal messages.

3.5.4. A complaint is defined as any written or verbal communication from the customer expressing dissatisfaction with a service or an action taken by Marion County into which further investigation is required.

3.5.5. The person receiving the complaint will forward it to the department representative for entry in the CRM system, ensuring that all the applicable information has been gathered and entered.

3.5.5.1. Pertinent call information includes, but is not limited to, contact information for the customer, what the problem is, when it occurred, and the desired outcome.

3.5.5.2. Customers should receive an acknowledgement within two business days and a formal notification of action or status within five days. If additional time to respond is needed the customer will be contacted with an estimated time frame for final response.

3.5.5.3. Complaints from the public regarding county services, programs, policies or

employee conduct, should be documented and entered in to the CRM system. (The CRM system is not meant to be a call log of every call, question or general inquiry.)

- 3.5.5.4. Complaints regarding the conduct of Marion County employees or volunteers will be assigned to Human Resources for follow-up by the Human Resources Manager.
- 3.5.6. The complaint will be forwarded to a manager for review, prioritization, and assignment for follow-up, if necessary.
- 3.5.7. The results of the customer complaint will be communicated to the customer indicating what action will or will not be taken and when the action will be implemented, if applicable.
- 3.5.8. The records of customer complaints will be retained per statutory and regulatory guidelines. All records retained in the CRM are public records subject to disclosure unless expressly exempted from disclosure by state or federal law.
- 3.5.9. The status of customer complaints will be reviewed as part of the management review process.
- 3.5.10. At least annually, a report on the number of complaints received by department and type will be compiled by the Board of Commissioners' Office and presented to the Board of Commissioners. Department heads and division managers are encouraged to review complaint status on a regular basis.

#### 4. Department Surveys to Measure Customer Satisfaction

- 4.1. Feedback from customers on their perception of the county's level and quality of service is crucial in the development of excellent customer service. To this extent, county departments are encouraged to conduct a biennial customer service survey to receive feedback on specific departmental programs. In addition to individual department surveys, the board may commission periodic countywide surveys to obtain an overall sense of how county operations and services are meeting the needs of external customers.
- 4.2. Surveys will be made available to customers in a variety of formats.
- 4.3. When the survey is complete, departments will conduct an analysis of the survey data, create an action plan, and present this information to the Marion County Board of Commissioners within three to six months from the time when the survey was conducted.
- 4.4. The survey reports will be used to measure improvement in customer satisfaction levels.

#### 5. Designation of an Awards Committee and Coordinator

- 5.1. A successful customer service program motivates and recognizes employees and volunteers

who meet and exceed customer standards. An Awards Committee Coordinator will be designated for the county.

- 5.2. The Marion County Awards Committee shall meet twice a year to review nominations, select recipients, and arrange presentations of awards.
  - 5.3 Marion County has four employee award categories: Customer Service Award, Vision Award, CAO Teamwork Award, and Troy Thompson Humanitarian Award.
6. Ongoing training in customer service is necessary to establish awareness of the program expectations as well as update county employees and volunteers on any changes. At a minimum, training and education of Marion County's customer service standards will be provided by:
- 6.1. Initial countywide training
  - 6.2. New Employee Orientation training
  - 6.3. Departments encouraging employees/volunteers to participate in customer service seminars or workshops offered by the county or private sector.

# **ATTACHMENT A**

## **Marion County Customer Service Standards**



## **CUSTOMER SERVICE STANDARDS**

### **Guiding Principles**

The following apply to both internal and external customers.

In general:

- ☞ All customers should be treated professionally and with respect.
- ☞ County services, whether presented in person, in written correspondence, or on the telephone, should be timely, accurate and understandable to our customers.
- ☞ Always convey a favorable image of the county and the department where you are working.
- ☞ We are here to serve the public.
- ☞ We will be empathetic and helpful, and attempt to bring about resolutions that are satisfactory to both our customers and the county.
- ☞ Take responsibility- if things go wrong the customer is entitled to an explanation and an apology.

*Please note that the following guiding principles are taken from the Marion County Administrative Policies and Procedures, Customer Service Program Policy # 211.*



### **Telephone/Voicemail**

#### Telephone

##### Office Reception

- Whenever practical, a person will answer the main department number at each answering station during business hours.
- Telephones will be answered promptly, within 3 rings whenever possible.
- Calls will be answered courteously and professionally.

- All incoming calls from external sources will be answered with a consistent greeting such as” Marion County (Department/ Division), this is \_\_\_\_\_ (name), how may I help you?”
- Calls will be answered in the order received. Callers may be given the option to be put on hold or called back.
- If a caller wishes to stay on the line, and is holding for an extended period of time, regular updates will be provided.
- After the caller has finished speaking, staff will paraphrase what was said to ensure the request is understood (e.g., “What I hear you saying is...”).
- If the person who is being called is not available, staff will provide caller the option to go to voicemail. If it is an emergency, the caller will be directed to an employee who can assist.
- Before Transferring Calls:
  - The nature of the call will be understood.
  - Callers will be informed to whom they are being transferred.
  - Callers will be provided the name, phone number, and division/department to which they are being transferred.
  - The person transferring the call will, whenever practical, wait for the call to be answered, announce who is being transferred and provide a brief description of the callers’ request.
- If a call is received during interdepartmental coverage, staff will explain they are covering for a different department/division and offer to take a message, or transfer the call to voicemail.

#### Office Staff

- Telephones will be answered promptly, within 3 rings whenever possible.
- Calls will be answered courteously and professionally.
- All incoming calls from external sources will be answered with a consistent greeting such as” Marion County (Department/ Division), this is \_\_\_\_\_ (name), how may I help you?”

#### Staff Working Outside of Office Stations

- Cell phones will be answered promptly whenever possible. See Administrative Policy #703 – Cellular Telephones.



- Calls will be answered courteously and professionally.
- All incoming calls will be answered with a consistent greeting such as "Marion County (Department/ Division), this is \_\_\_\_\_ (name), how may I help you?"

### Voicemail

- The greeting of an outgoing voicemail message should include the full name of the staff person, the department name, frequency with which messages will be checked, and a provision for contacting someone in person.
- If there is not a provision for contacting someone in person, such as during non-work hours, communicate this information in the outgoing voicemail message.
- On regular business days, voicemails received from callers will be acknowledged within a 24-hour period or within the next business day.
- Outgoing messages will be kept current.
- Update the message as circumstances change. Consider special messages or attendant options when you are out of the office for several days.
- Carefully evaluate the content of all pre-recorded messages. Be sensitive to the order in which information is given and the time it takes to give the message.
- Establish a backup system to check your messages if you are away from the office for an extended period of time.
- Forward your phone to a voice mailbox when you leave your office in order to eliminate the 4 ring waiting period. Deactivate the forward feature when you return.

### Cell Phone

- The greeting of an outgoing voicemail message should include the full name of the staff person, the department name, frequency with which messages will be checked, and a provision for contacting someone in person.
- If there is not a provision for contacting someone in person, such as during non-work hours, communicate this information in the outgoing voicemail message.
- On regular business days, voicemails received from callers will be acknowledged within a 24-hour period or within the next business day.
- Outgoing messages will be kept current.
- Update the message as circumstances change. Consider special messages or attendant options when you are out of the office for several days.

- Carefully evaluate the content of all pre-recorded messages. Be sensitive to the order in which information is given and the time it takes to give the message.

### **County Meetings**

- Members of the public will be given a reasonable advance notice of meetings per Oregon's Public Meetings Law.
- Meeting notifications will contain accurate information, date, time place, and point of contact, telephone number, and directions.
- Potential attendees will be informed of schedule changes or cancellations prior to the meeting.
- Agendas will be available and distributed in advance of meetings.
- Meetings will start and end on time.
- Meetings will be organized, run efficiently (proper equipment & handouts), and conducted in a professional manner.
- Meetings involving the public will be posted on a calendar on the homepage of the Marion County Website.
- Meetings hosted by Marion County will be held in properly maintained facilities, that are sanitary, safe, operational, accessible, and ADA compliant.

### **Written Correspondence**

This includes letters, memorandums, and faxes.

- Marion County will develop letter, memorandum, and fax templates for external communications with the public and post these on the County Intranet.
- Marion County will also develop templates for written correspondence and place these on the Customer Service Intranet website.
- Responses should be complete, accurate, and precise. Use spell check and proofread final documents. When possible, have a second person proofread for you.
- Responses should be drafted within 72 hours or 3 business days, and mailed within 5 business days.
- The tone should be respectful and plain language should be used.
- If responding to a query, address this in the letter.

- Always leave a contact number, name, and address for the customer, including your department particulars.

### E-mails

- Respond to e-mail queries within a 24 hour period when appropriate.
- Put the appropriate subject issue in the SUBJECT line. Do not leave blank.
- Use professional, non-jargon language
- Use spell check
- When appropriate, use a signature block with:
  - Staff person's name, title,
  - Department,
  - Address,
  - Phone, fax and e-mail address.
- Use discretion when responding to group queries that have gone back and forth. Some individuals who are copied along with original e-mail may not want to be involved in an ongoing e-mail dialogue.
- If you will be away from the Office, set your "Rules" in GroupWise to respond to incoming emails with information of your absence, return date, and alternate contact person.

### When Working Directly With Customers

- Make eye contact
- Listen
- Take responsibility
- Be positive
- Be courteous - excuse yourself if you are interrupted

# **ATTACHMENT B**

## **Marion County Customer Service Standards Desktop Summary**



# **Customer Service Satisfaction Standards**

Marion County is working to achieve the following customer service standards in support of improving outcomes for its customers.

## **PERSONAL SERVICE DELIVERY**

The service delivery team – staff and volunteers – will treat customers and each other with courtesy, dignity, and respect.

- Introduce themselves by name**
- Listen carefully and patiently to customers**
- Be responsive to cultural and linguistic needs**
- Explain procedures clearly**
- Build on the strengths of the customer**

## **SERVICE ACCESS**

Providers will work proactively to facilitate customer access to services.

- Provide services as promptly as possible**
- Provide clear directions and service information**
- Reach out to the community and promote available services**
- Involve and communicate with customers about service plan development**
- Follow-up to ensure appropriate delivery of services**

## **SERVICE ENVIRONMENT**

Service providers will deliver services in a clean, safe, and welcoming environment, which supports the effective delivery of services.

- Ensure a safe environment**
- Ensure a professional atmosphere**
- Display vision, mission, and values statements**
- Provide a clean and comfortable waiting area**
- Ensure privacy**
- Where applicable, post complaint and/or appeal procedures**

*Adapted from the Marion County Customer Service Program- Page 211.3*