

Mecklenburg County

Assessor's Office – Customer Service Assessment



Proposal to Assess and Plan for Improvements in Assessor's Office Performance

December 12, 2012





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Understanding of Needs

Mecklenburg County's County Manager's Office (CMO) has requested that Customer Service Solutions, Inc. (CSS) provide a Customer Service Assessment of the Assessor's Office. This request is to take action on a recommendation of Pearson's Appraisal Services – the organization which conducted the review of the Mecklenburg County 2011 Property Revaluation. Pearson recommended that customer service be a top priority for the entire Assessor's Office. In their full report, they stated:

Poor customer service was a recurring theme we encountered during our interactions with property owners throughout our review process. It is paramount to a revaluation process that taxpayers be treated as customers. While there may be disagreement on property value, it is important to be respectful of property owners and appellants throughout the revaluation process. It is our recommendation that all Mecklenburg County Tax Office staff be properly trained on best practices for dealing with citizens both in-person and over the phone.

In addition to these comments and suggestions, the Board of County Commissioners (BOCC) has made a key goal to “*Build a strong culture of customer service within the Assessor's Office.*” To achieve this goal, the BOCC stated that “*The improvement plan will be to reform and transform the Assessor's Office and make customer service and satisfaction a top priority.*”

Summary

The CMO needs an assessment of the Assessor's Office customer service culture. It needs to identify the high priority areas of focus that would most quickly and cost-effectively improve responsiveness to customers while still understanding a solid long-term strategy to begin moving the culture toward a truly customer-oriented focus.

Project Approach and Scope

The approach which CSS will take in this Customer Service Performance Assessment will involve answering several key questions:

- ❖ What is the current state of customer service at the Assessor's Office?
- ❖ What are the areas of strength?
- ❖ What are the highest priorities needing improvement, and what are the root causes of those issues?
- ❖ Are the issues stemming from poor planning, misaligned incentives, the organizational structure, ineffective processes, hiring/training practices, leadership in general, internal/external communications, or some other aspect of the culture itself?

To help answer those and other questions, Customer Service Solutions, Inc. has a proprietary model – the CSS Service Culture Model™ – that we use to help organizations wanting to make sure they create and keep a culture of customer service. We use a very structured methodology for helping our clients by using this model to assess the key components of having a service culture, identifying strengths and gaps in performance or services, and creating a detailed plan for getting everyone in the organization involved with and moving toward this service focus.

For the Assessor's Office, we would begin this process by sending the organization an Information Request List and Interview List. The Information Request List includes items as organizational mission/vision/goals, metrics, customer service initiatives and structures, customer satisfaction survey results, employee-climate survey results, core process and communication maps, and other project-related information such as data gathered by Pearson which addresses customer service.

Next, CSS spends time onsite meeting with the client's management, staff, and – if necessary and beneficial – customers to best understand the organizational culture, structures, incentive systems, communications, training, processes, and service levels. **At the CMO's request, this project will have a broad scope across all Assessor's Office service lines, beyond just real property appraisal and appeals. However, we will pay particular attention to those communications and customer service processes relating to the Revaluation and appeals.** Noted below are examples of some of what we would do while onsite:

- ❖ **Comparative Culture Assessment (CCA).** To gain an understanding of the depth and consistency of commitment to the customer, CSS interviews management and staff at all levels and across multiple areas to gauge service mindset for comparison horizontally and vertically in the organization.
- ❖ **Selective Customer Interviews.** If helpful and possible, CSS conducts interviews with representative customers to gauge the client's performance through its customers' eyes.
- ❖ **Evaluation of Corporate and Individual Goals and Incentives.** In conjunction with the CCA, CSS reviews the extent to which the organizational structure, incentive/reward systems, and accountability methods (such as performance evaluations) are designed around meeting the needs of the customer and drive behaviors that promote high levels of customer satisfaction.
- ❖ **Review of Key Service and Communications Processes.** CSS reviews major communications and service processes to identify where operational effectiveness could be improved to impact customer satisfaction.
- ❖ **Evaluation of Performance and Customer Satisfaction Metrics.** CSS assesses customer satisfaction, employee satisfaction, and process measures used to gauge service performance.

Deliverables

As a part of the final deliverable, CSS would provide the CMO with recommended methods of addressing facility, process, training, incentive, measurement, structure, and other needs that help to create a culture of customer service and improve the overall customer experience and responsiveness. An important part of that plan will be identifying and documenting the keys to having front-line staff that care about customer service and have the skills to successfully deliver a consistently outstanding service experience.

As noted earlier, the information and analysis provided will be based on CSS' comparison of the Assessor's Office operations and culture against CSS' proprietary Service Culture Model as well as be based on best practices learned from other clients which may be applied to the Assessor's Office. We will provide the formal assessment with detailed recommendations for the organization, and we will delineate those recommended action items that will impact the Revaluation and appeals processes, in particular.

The Customer Service Performance Assessment that CSS would develop would be comprehensive, long-term oriented, and based on the current state and future goals of the client. We're confident that we could create a plan that could be implemented and thereby result in the type of service culture transformation that the organization desires.

Project Timelines and Fees

The CMO would like to begin this project by early January with a due date of no later than June 18, 2013, and preferably within 120 days. Projects with this type of organization-wide scope typically require about 3-4 months to complete, so the CMO's desired timeframes will be met.

CSS would provide the services noted in this proposal, focusing on assessing the overall customer service culture and operations of the Assessor's Office. We would create a detailed plan to transform the organization's culture and customer service.

❖ Professional Fees: \$22,800 based on 19 project days at \$1,200/day

Expectations of Mecklenburg County

The size and scope of this project requires a commitment from the County to be a participative member. Maximum benefit from this type of analysis is achieved only when consistent and frequent communications about project status as well as the resulting buy-in of the project stakeholders are achieved. For Mecklenburg County, this will best be accomplished through the following:

- ❖ Designating a key contact who will serve as the point person for the project, receive project status reports from CSS, communicate reports to appropriate parties as needed, make decisions about questions of scope and focus, and facilitate CSS' efforts in arranging meetings and collecting data.
- ❖ Ensuring sufficient access to the key contact so as to avoid any unnecessary delays in progress of the project.
- ❖ Facilitating access to key department management personnel to aid in the completion of data collection and analysis. Allowing access to data, process, and system information that may need to be reviewed as a part of this project.

This commitment on the part of Mecklenburg County is vital to the ongoing progression of the project and to providing effective communication on project status to all stakeholders.

Contract Terms

CSS is very flexible in its payment requests. For this type of project, CSS requests a deposit equal to 1/3rd of professional fees. The next 1/3rd is billed after the first full month of project work, and the remaining 1/3rd would be billed after project completion.

In addition to professional fees, CSS will bill Mecklenburg County for expenses associated with travel and materials, not to exceed 5% of total professional fees. CSS will make reasonable efforts to minimize out-of-pocket expenditures whenever possible, and we believe that expenses should be negligible for this project.

Agreement and Timetables

CSS agrees to provide the services noted in this proposal with the goal of providing the Assessor's Office with an overall evaluation of its customer service orientation, responsiveness, and effectiveness. CSS will begin this project within two (2) weeks of receiving the signed agreement. The pricing and terms of this proposal are good through January 12, 2013.

Customer Service Solutions, Inc. Representative

Date

The CMO agrees to the terms outlined herein and agrees to pay the amounts noted in this agreement within the specified timeframes.

Mecklenburg County Representative

Date