



# Assessor's Office

## Customer Service Performance Assessment

### Project Status Update

Customer Service Solutions, Inc.

March 19, 2013



# Presentation Plan

- CSS Overview
- Discuss Project Goals/Charge, Scope, and Phases
- Address/Define Two Core Project Focuses
- Discuss Activities to-Date
- Share Next Steps



# Introduction to CSS

- Founded in 1998
- Co-founder: 25+ Years Management Consulting, Research, Training
- Industries: Government, Education, Healthcare, Sports, and Others
- Management Consulting Firm Focused Exclusively on Customer Service and Client Retention
- Business Model: Small Staff Using Partners to Flex Based on Project
- 700+ Projects Over Past 15 Years
  - Strategy (Culture Change, CEM, Retention), Operations, Research, Training)



# Project Goals from the BOCC

- Determine How to...
  - *"Build a strong culture of customer service within the Assessor's Office."*
- Develop a Customer Service Improvement Plan
  - *"The improvement plan will be to reform and transform the Assessor's Office and make customer service and satisfaction a top priority."*



# Project Focus

- Culture Change Evaluation and Planning
  - Internally Focused – *How things work in the AO...*
    - Decision-making, Communications, Relationships, etc.
- Customer Service Improvement Planning
  - More Externally Focused
  - The Customer Experience
    - Expectations v. Reality
    - Attitudes, Processes, Facility, Communications

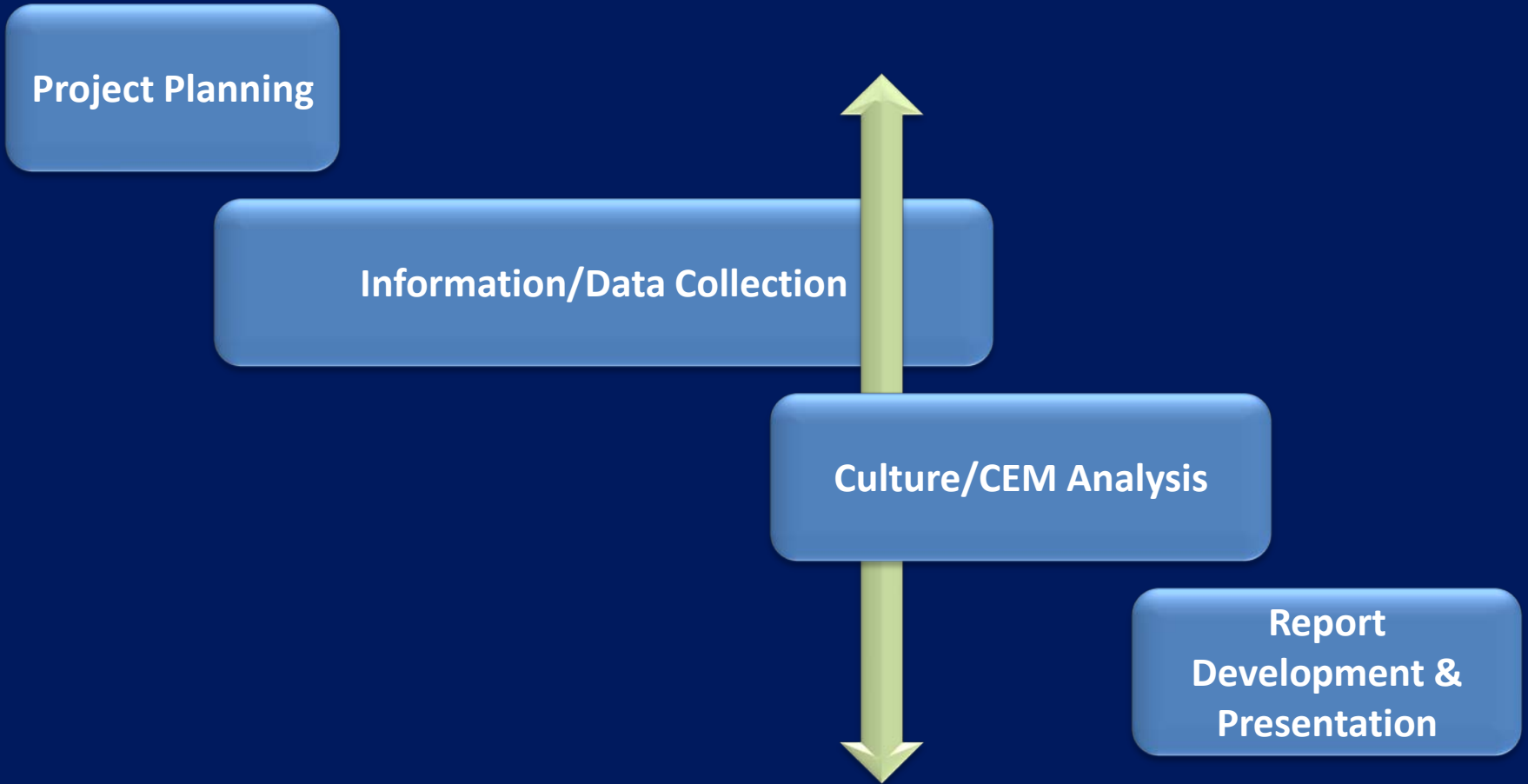


# Project Scope

- All Assessor's Office service lines including:
  - Real Estate
  - Business Personal Property
  - Individual Personal Property
  - Registered Motor Vehicles
- Reval/Appeals Focus
  - Pay particular attention to communications and customer service processes relating to the Revaluation and appeals



# Project Phases





# Structure of Expected Deliverable

- **Address root causes**
  - To create permanent solutions
- **Build on current positives**
  - Note what is working
- **Identify Key Success Factors**
  - For culture and customer service improvement success
- **Quick impact v. longer-term recommendations**
  - Assess to identify actions; create **plan** to implement
- **Segment reval-related actions**
  - Highlight those impacting revaluation and appeals processes





# Key Project Components

- Comparative Culture Assessment
- Analysis of the Voice of the Customer
- Evaluation of Corporate and Individual Goals and Incentives
- Review of Key Service and Communications Processes
- Evaluation of Performance and Customer Satisfaction Metrics



# Started with Voice of the Customer

- Analyzing results of 2012 citizen forums hosted by Pearson's Appraisal
  - 10+ hours of audio tape
  - 100+ speakers
  - 200+ forms completed by taxpayers
- Reviewed Pearson's Assessment
- Met with Pearson's representatives about customer service/communications-related issues and scope
- Reviewed 3 years of AO Work Plan Information
- Reviewed 4 different AO customer satisfaction survey reports



# Reviewed Process and Communications-Oriented Information

- Met with 7 BER members; observed 4 meetings
- Assessing multiple revaluation, appeal, and communications planning documents
- Met with BSSA-PI representative
- Reviewing reval website
- Reviewing 12 different customer notices used over past 2 years
- Met with 311 representatives



# Turned Focus Internal

- Reviewed 3 years of Employee Climate Survey Data
- Interviewed 30+ Assessor's Office staff
  - Managers/Supervisors from Real Estate, Operations, Admin, Account Services
  - Staff-level Group and 1-on-1 Interviews



# Received/Requested Additional Information

- AO Foundation Statements (Mission/Vision/Values)
- Organization Charts
- Appeal-related volume data
- Customer Focus Groups/Interviews
- Reward/recognition systems & performance evaluations
- Process flows/descriptions dealing with customer communications



# Upcoming Activities Planned

- Continue to schedule meetings and meet with project stakeholders
- Conclude Information/Data Collection Phase and move more fully into Culture/CEM Analysis
- Begin formal overall report on Findings/Conclusions/Recommendations
- Present final report with Action Plan in May