

Mecklenburg County Assessor's Office

Customer Service Assessment

Key Points (Project Definition)

Project Focus and Goals

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. 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.”*

Overall Approach

CSS will use its proprietary model – the CSS Service Culture Model™ – as the basis to evaluate the Assessor's Office and to ensure they can create and keep a culture of customer service. We use a very structured methodology to assess the key components of 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. We will begin this process by sending the organization an Information Request List and Interview Request. The Information Request List includes such 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 customer feedback data gathered by Pearson's.

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 will 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.
- ❖ **Analysis of the Voice of the Customer.** We'll review and assess customer feedback from the Pearson's Appraisal forums, Assessor's Office customer satisfaction surveys, onsite observation, and – where helpful and possible – interviews with representative customers to gauge the client's performance through its customers' eyes.
- ❖ **Evaluation of Corporate and Individual Goals and Incentives.** CSS reviews the extent to which the organizational structure, incentive/reward systems, and accountability methods are designed around meeting customer needs and drive behaviors that promote 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.

Expected Deliverables

CSS will provide 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 convey they care about customer service and have the skills to successfully deliver a consistently outstanding service experience. 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 will be comprehensive, long-term oriented, and based on the current state and future goals of the client. We're confident that we will create a plan that could be implemented and thereby result in the type of service culture transformation that the organization desires.

Project Timelines

The following are key activities and milestones for this engagement:

Task	Target Completion Dates
Form Project Infrastructure	
Identify Project Structure, Focus, and Scope	12/31/12
Create Information Request List (IRL) and Interview List	1/4/13
Develop/Refine/Finalize Project Plan	1/15/13
Design/Initiate Project Communications Plan	1/15/13
Conduct Assessment	
Execute Communications Plan	Ongoing
Client Provides Requested Information from IRL	1/31/13
Conduct Initial Site Visits and Interviews with Requested Personnel	2/28/13
Complete Data Collection, and Analyze Findings Across Key Areas: Comparative Culture Assessment Analysis of 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	3/24/13
Create, Refine, and Present Customer Service Improvement Plan	
Complete Draft Customer Service Improvement Plan	3/31/13
Present Draft Report	4/15/13
Refine Draft Report and Finalize Assessment	5/1/13

As noted in the Project Plan above, CSS is working with the Assessor's Office to execute an ongoing Communications Plan to ensure that all key stakeholders are kept abreast of project progress.