



# Assessor's Office Customer Service Assessment Report to the Board of County Commissioners

Customer Service Solutions, Inc.

May 28, 2013



# Today's Plan

- Discuss Project Goals/Charge, Scope
- Address/Define Two Core Project Focuses
- Discuss Methodology
- Identify Key Conclusions/Recommendations
- Refer to Detailed Key Findings/Conclusions
- Discuss Next Steps



# CSS Overview

- 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 Divisions including:
  - Real Estate Appraisal
  - Operations
    - Deal with all Service Lines
  - Account Services
    - Deal with all Service Lines
  - Administration
    - Deal with all Service Lines



# 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

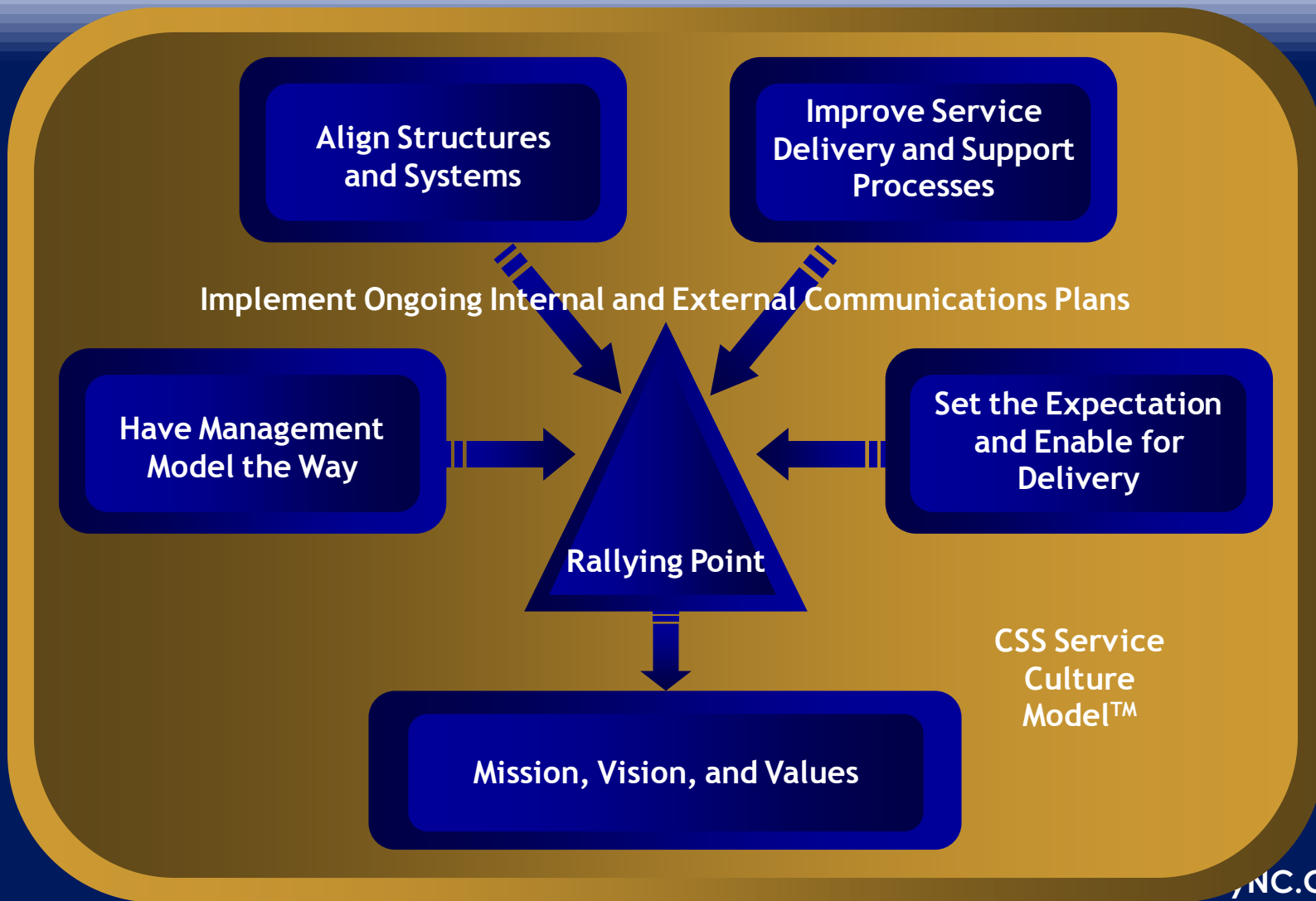


Goal: Create a Healthy, High  
Performing Organization...

...the Model Assessor's Office



# Healthy Organizations Have an Aligned Culture





# Methodology Overview



# Methodology Components

- 60+ Data Sources
- Voice of the Customer (VOC)
  - Reviewed Pearson's Information; Conducted Multiple Customer Focus Groups
  - Assessed Historical Internal AO Customer Satisfaction Data; Reviewed 311 Feedback
- Reviewed Process and Communications Information
  - Held BER Focus Group (7 of 9) and Observations
  - Reviewed Broad-based Communications and Met with PI Staff
  - Reviewed Reval/Appeals Sites
  - Reviewed Customer Notices/Mailings



# Methodology Components

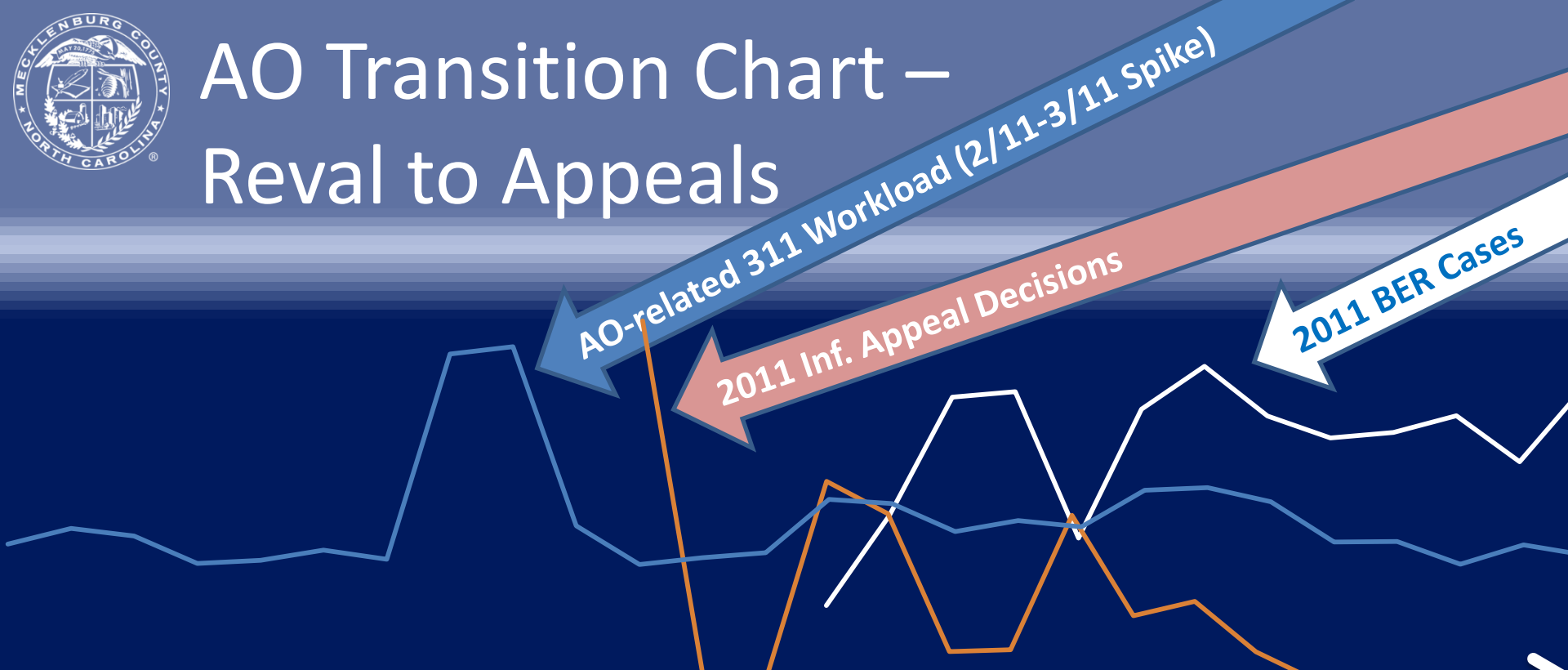
- Turned Focus Internal
  - Reviewed 3 years of Employee Climate Survey
  - Interviewed 30+ Assessor's Office staff
- Reviewed Other Organizational Information
  - AO Foundation Statements
  - Appeals-related Volume Data
  - Reward/Recognition Systems
  - Process Documentation
  - Mid-stream issues/improvement listing



# Transforming the Culture and the Customer Experience



# AO Transition Chart – Reval to Appeals



J A S O N D J **R** M A M J J A S O N D J F M A M J J



	2008	2009	2010	2011	2012	2013
Assessor's Office FTEs	80	83	76	73	73	73

# Mid-Stream Activities  
burgCountyNC.Gov



# Key Conclusions and Root Causes

- Department Operations
  - Planning, forecasting, and internal communications issues
  - Organizational Structure caused workflow and interpersonal issues; lack of dedicated resources for CEM and QA
  - Lack of well-documented processes, flows (internal or customer-facing); Process/Systems don't lend efficiencies
  - Lack of focus on testing, measurement (VOC), and Quality Assurance



# Key Conclusions and Root Causes

- Customer Service Mindset
  - Staff worked exceptionally hard through the issues, changes, workload spikes
  - Vision/Values useful but not used
  - Overly focused on “defending” rather than empathy and working with customers toward solutions
  - Too reactive; need proactive information sharing
  - Interdivisional relationships not strong enough or collaborative enough (issues: blame v. solution)



# Adopting a Service Mindset

- Adopt Core Customer Service Guiding Principles such as...
  - The taxpayer is our customer
  - What we do, we do for the customer and for the community
  - The goal is to work with the customer toward **accuracy** and **fairness** in a **clear** and customer-friendly manner, not to win a debate
  - We need to live our Core Values and build them into everything we do



# Define Qualities of the Desired AO Culture

- Has Organizational Synergies
  - Working across functional lines for the good of the customer, the organization, and each other
- Is Customer Service-Focused
  - Designs/delivers communications based on customer needs; listens, conveys patience
- Is Education-Oriented
  - Proactively educates, offers suggestions unsolicited, and thinking about next steps
- Has Continuous Improvement Mindset
  - Measuring, planning, incorporating VOC, and implementing to get better – Data-Driven





# Recommendations/Guidance Provided During the Project

- Offered input to BOCC/BER Subcommittee and about the Taxpayer Guide
- Presented 23 additional BER recommendations to AO on BER-related training, process, and communications
- Provided interview questions to ask prospective new assessors
- Facilitated AO working session that redesigned and created an internal consistency approach for Appeals auto-reply emails



# Recommendations/Guidance Provided During the Project

- Presented 20 conclusions and recommendations on Future Communication Plans to BSSA-PI
- Offered 9 Near-term Impact Culture/Customer Service Recommendations to AO
- Met with BSSA personnel to gain perspective and buy-in for implementation support
- Working with AO to design BER survey tool and put measurement/reporting plan in place for BOCC



# Core Recommendation Areas

- Cultural Changes
  - Leadership Modeling – Defining a Rallying Point, exhibiting behaviors expected of staff
  - Organizational Structure – “Real” Appeals Support Team, Dedicated CEM/QA Roles
  - Vision/Values – Creating strategies to move toward
  - Branded Customer Service – Assessor’s Office TLC (Timeliness, Listening, Courtesy & Respect)
    - Design and Train/promote
  - Internal Communications – Intranet and visuals that share plans, issues, etc., throughout AO



# Core Recommendation Areas

- Citizen Access
  - Onsite Fast-Track – Process/Package specific to citizens without web access or preferring face-to-face meetings
  - Facility – Improved signage; facility evaluation for flow and capacity
- Citizen Communications
  - Adopting Maxims, noting decision reasons, testing customer communication materials, providing sample completed documents, involving stakeholders on a timely basis, standardizing across communication types
- Citizen Education/Information
  - Design a Web Hub for Reval/Appeal information; augment with “My Real Property” website
  - Create “Assessment U” or “Reval University” – Tools, Methodologies, Key Processes and Documentation



# Core Recommendation Areas

- Continuous Improvement
  - Ongoing VOC processes/metrics
  - QA measurement and reward/accountability processes
- Implementation Support
  - Visioning - I.D. the Desired Culture & a Rallying Point
  - Transformation Communications Planning
  - Creating a Culture Transformation Team
  - Tap into Internal Resources such as BSSA – Organizational Improvement, H.R., Facilities support
    - OI = Process documentation and redesign, team dynamics, education, tracking and planning tools, staffing/forecasting, etc.





# Action Planning Approach

- 50+ recommendations already shared with County personnel
- Many short-term recommendations noted
- Staged recommendations provided
- Reval-related v. more broad-based AO-related identified
- Culture changes often take 18-24 months to take full effect
- Customer experience changes can happen much more quickly



# Action Planning Timeframes

- Q2-2013 Start
  - Near-Term CEM/Culture and BER
  - Customer Service Branding, Documentation Maxims
  - Dedicated Staffing, Transformation Infrastructure
- Q3-2013 Start (Launch Teams)
  - Citizen Access (Onsite and Online) Redesign
  - Customer Documentation Redesign Launch
  - Strategic Vision/Values and Internal Communication Planning
  - Training, Process Documentation
- Future
  - Reval-related Communication Planning, Assessment U, Facility Audit



# Key Success Factors

- **Get Leadership Buy-in and Modeling**
  - From Assessor and his/her superiors
- **Define and Promote a Rallying Point**
  - Noting – in a positive way – why the change is occurring...what's the goal
- **Create a Support Structure**
  - Developing a Culture Transformation support structure
- **Execute Ongoing Internal/External Communications**
  - Within AO and with County Stakeholders; with the Community
- **Methodically Progress**
  - Commit, celebrate improvements, and continually improve



# Detailing Key Findings, Conclusions, and Root Causes



# Key Findings/Conclusions

- Revaluation History and Planning
  - There were 2 postponed revaluations in 2007 and 2009
  - Much of leadership and staff hadn't gone through a revaluation
  - Planning, decision-making, and resulting communications largely done in small groups and very tactically-oriented instead of longer-term and broad-based in nature
  - Great deal of work on residential, in particular, leading up to 2011 revaluation; this led to less time than anticipated on the Commercial neighborhood revaluation



# Key Findings/Conclusions

- Revaluation Preparations
  - Insufficient training done for some areas/personnel that had never gone through a revaluation
  - Training needs weren't sufficiently built into the timeline of longer-term plans
    - Time wasn't effectively allocated and planned well in advance for training; much was done Just-in-Time, which is sometimes appropriate
  - Testing (particularly of internal processes, for customer-based actions, or as training follow-up) doesn't appear to be a significant part of planning efforts



# Key Findings/Conclusions

- Anticipating Workload
  - General consensus for informal appeals 7-8% low (40k expected v. 43k+); expectation not consistently known (20/40/60)
  - Forecasting for BER-level short (8k projected v. 11.5k)
  - Forecasting didn't adequately address workload associated with operationalizing changes in our business
    - For example, what are the man hours required and scheduling considerations for training, changes in processes, staffing, facilities, etc.?
    - What adjustments were made when tracking exceeded projections? How early was that determined?



# Key Findings/Conclusions

- Processes and Systems
  - Technology wasn't (isn't) ready to support efficiencies and high quality
    - Started scanning shortly after appeals flowed in; then it went slowly; scanning stopped, sorted, and Appraisal staff later resorted 40k documents (systems/communications issues)
    - NCPTS Appeals process/module was not ready until March 2011 (a technology issue), and the Office didn't begin working appeals until May 2011
    - NCPTS and Assesspro aren't integrated in any sort of real-time manner; there were delays in data migration; there – still today – is double data-entry



# Key Findings/Conclusions

- Processes and Systems (cont'd)
  - Processes not universally understood and agreed to well in advance (i.e., mail sorting issues)
  - Key processes not documented in a way that one could see how all parts of AO work together in delivering a service
  - Appraisers had to run sales reports and detailed property record cards
  - Summary: AO not nearly as efficient as possible



# Key Findings/Conclusions

- Lack of Action on Vision/Values (Developed fall 2010)
  - Based on issues/complaints surrounding the 2011 Revaluation, Vision still seems appropriate
    - "To be recognized for providing fair, clear, and accurate assessment services to assist local government in serving the community.
    - We accomplish this by being a skilled, knowledgeable, and informed team, with integrated and reliable technology and work processes, making this a great place to work."



# Key Findings/Conclusions

- **Lack of Action on Vision/Values (cont'd)**
  - Many customer complaints are specifically about the Values not being lived in the Office:
    - **Trustworthy**
    - **Timely**
    - **Open**
    - **Clear**
    - **Knowledgeable**



# Key Findings/Conclusions

- Other Cultural Conclusions
  - People work exceptionally hard to get the job done
  - There were many mid-stream changes to deal with issues that occurred throughout the revaluation and appeals processes
  - Supervisor/manager communications and relationships had/have issues which don't facilitate cross-divisional support



# Key Findings/Conclusions

- Other Cultural Conclusions (cont'd)
  - Internal issues from the 2009 reorganization still exist (in both operations and personal feelings/attitudes)
    - Reorganization initially done in response to budgetary constraints
  - The organizational structure was not setup to focus on appeals in particular, although during the process, the organization did setup an AST to create that focus
  - No single point person responsible solely for customer relations, nor for ongoing measurement of internal performance and quality assurance



# Key Findings/Conclusions

- Impacts of Issues with Other Stakeholders
  - Concerns about the BER, the PTC, 311, and other areas of the county or state reflected negatively on the Assessor's Office in general
  - BER lost members, reducing capacity to hear formal appeals by 40% (from 5 days to 3) while BER actual volumes were close to 50% over projections



# Key Findings/Conclusions

- Quality Assurance
  - Quality assurance processes to ensure customer needs are met don't appear to exist in any significant form
  - We're uncertain of what accountability processes are in place if there is inconsistency, quality, or performance issues since there doesn't appear to be much objective tracking



# Key Findings/Conclusions

- Other Performance Measurement
  - Employee Climate Survey conducted annually
  - Comment Cards and e-mail link used and reported periodically (although not universally used)
  - On Work Plans, non-Real Estate areas generally hit targets for customer satisfaction
  - Other VOC surveys either never started or started and occurred less frequently over time (e.g., BER Surveys, Appraisers, TMA, mailouts, intercept interviews, etc.)



# Key Findings/Conclusions

- Internal Communications/Consistency of Messages
  - There were multiple examples of internal customer service breakdowns (lack of or late callbacks when requested across AO divisions)
  - The department has significant issues with consistency of messages to customers across divisions, within divisions, and across different platforms; this impairs trust in the people and processes



# Key Findings/Conclusions

- Citizen Access
  - Although the customers wanted face-to-face access with appraisers at Bob Walton, the organization didn't actively provide that; even with the "Appraiser of the Week," they are not located with the AST staff
  - Some customers have difficulty navigating the facility, or they had long waits in the halls to have questions answered or for their BER hearing
  - Redesigned waiting area opened in Account Services in Spring 2012 (more than a year after revaluation notices went out)
    - Funding constraints impacted timing



# Key Findings/Conclusions

- Customer Communications
  - Appeals cards have far too many “NO CHANGES” responses without the rejection reason included – this applies to both informal and the BER
  - Many taxpayers did not hear anything on their informals for a year other than potentially receiving a postcard
  - What information that was pushed out prior to the revaluation (particularly web-based) often created more knowledgeable taxpayers and more detailed complaints
  - Customer wanted field face-to-face meetings, but this happened infrequently.



# Key Findings/Conclusions

- Customer Communications (cont'd)
  - Many forms not structured for ease of reading or ease of understanding by the general public
- Customer Education/Knowledge (2 Extremes)
  - Customer education was incomplete/ineffective; obvious based on the high volume of appeals lacking appropriate information
  - Customers did, however, have access to a great deal of information via the web and other resources, and many of the documentation submissions with appeals were substantial



# Key Actions to Transforming the Culture and the Customer Experience



# Recommended Actions

- Foundation Statements
  - Conduct Vision-related planning to create alignment
  - Incorporate Core Values into Decision-making, processes, people evaluation/hiring, etc.
- BER Recommendations Already Offered to AO
  - Training, Facility/Signage, Documentation, Neighborhood Consistencies, BER Member Capacity



# Recommended Actions

- Communications Planning Recommendations Already Offered
  - Messaging, Becoming the Hub of Information, Projecting the Tipping Point to a Crisis, Systematic Measuring/Monitoring, Instituting a Plan Now
- Near-term Recommended Actions Already Offered
  - Low/No Cost, Culture and Customer Experience-focused
  - Topics: Tapping into PAS, Closing, Follow-up Calls, Executive Dialogue and Encouragement, Stopping “Defend” Mindset, Posting MVV



# Recommended Actions

- Organizational Structure
  - Utilize a Different Organizational Structure (or different working relationship – “Reval operations team”) during next Revaluation
  - Dedicated resource to manage the customer experience
  - Dedicated resource to manage organizational performance
  - Appraisers become part of (physically) the AST
  - Get divisions to know each other and their services, processes, timelines, etc. better



# Recommended Actions

- Planning, Deciding, and Communicating
  - Conduct more cross-divisional planning, decision-making, and resulting communications
  - Need a “Go To” place for plans throughout the AO
  - Build training time into overall work plans
  - Incorporate User Testing (both internal and with customers) into processes and communications
- Anticipating Workload
  - Consistently communicate volume projections
  - Determine and act on operational impact (worked hours, FTEs, etc.) of the volumes



# Recommended Actions

- **Processes and Systems**
  - Document key processes so that all of the Office understands how their roles impact others
  - Perform review of system permissions (such as running sales reports, property card access, etc.) to ensure wide enough access to information
  - Make decisions on systems to expedite integration or other means to determine how to improve efficiencies
- **Impacts of Issues with Other Stakeholders**
  - Educate the BER, 311, and other stakeholders on the same communications, principles, techniques as Assessor's Office staff



# Recommended Actions

- **Management Team Performance**
  - Launch effort to improve team dynamics and supervisor/manager communications and relationships across divisions
- **Quality Assurance**
  - Identify accountability processes to use to address staff or divisional issues with inconsistency, quality, or performance



# Recommended Actions

- **Citizen Access (Physical)**
  - Create an efficient method of serving customers (particularly elderly) that prefer face-to-face communications
  - Create waiting areas/processes that allow customers to have comfort and information available during waits at Bob Walton Plaza
  - Improve signage in Bob Walton upon entry and elsewhere, directing taxpayers to appropriate locations
- **Citizen Access (Online)**
  - Ensure ease of access to information online including appeal status, current Property Card, qualified sales, etc. (e.g., a “My Real Property” Site with a GUI interface to see one’s own data)



# Recommended Actions

- **Direct Customer Communications**
  - Provide reasons for change in values and appeal results
  - Create communication maxims
    - **Clear** – Information abundantly clear re: what taxpayer being asked to do, definitions, timeframes, steps, etc.
    - **Set/Manage Expectations** - What needs to happen, by whom, and when is well-articulated; then deliver. Never allow 2+ months between updates
    - **Test** – Assume customer doesn't know process and terms; test with them.



# Recommended Actions

- Direct Customer Communications (cont'd)
  - Ensure that forms needing completion by customers are provided with samples available about how to complete
  - Create easy-to-find & easy-to-understand materials
  - Test communications with “first-time” customers
  - Educate AO staff on key communication points



# Recommended Actions

- Direct Customer Communications (cont'd)
  - Involve all stakeholders with appropriate lead times before rollout of services or communications including all 4 areas of AO, 311, PI, etc.
    - Convey Key Messages to Stakeholders
    - Let know of Mail Out Dates
    - Allow Time for Their Input and to Train Staff Their Staff, etc.
  - Set/Manage Expectations by Providing Status Communications



# Recommended Actions

- Customer Education
  - Offer an educational forum (“Assessment U” or “Reval University”) for citizens that goes beyond the statutorily required meetings prior to the next revaluation to educate as needed on process, goals, resources, etc.
  - Include a glossary of key terms via the web and on any documentation where acronyms/terms may not be clear



# Recommended Actions

- Creating a Continuous Improvement Orientation
  - Get VOC and other systems in place to continue measuring the customer perceptions
  - Report on customer perceptions in a dashboard format within the AO and with key stakeholders
- Brand the AO Customer Service around the Core Values and/or key phrases like “TLC” – Timely, Listen, Courtesy & Respect



# Moving Toward Implementation



# Implementation Support Structure

- Build Transformation Foundation
  - Visioning - I.D. the Desired Culture & a Rallying Point
  - Transformation Communications Planning
    - Runs Concurrent with Transformation Initiatives
  - Structuring for Transformation
    - Culture Transformation Team (CTT)
      - Involve Key Leaders, BSSA, Staff, and Other Key Stakeholders
        - » Incorporate VOC
    - Identify Standard Task Team Structure



# Implementation Support Structure

- Tap into BSSA-OI Capabilities
  - Documenting Key Processes
  - Sharing Process Information in Simple, multi-view (overall, by division, etc.) format for internal use
  - Project Planning Tools and Training
  - Forecasting and Workload Management Systems
  - Project Management Systems and Possibly Training



# Implementation Support Structure

- Additional Uses of Internal County Resources
  - Internal Communication Systems (routine Info. Sharing)
  - I.T. Coordination Support
  - QA Tracking Systems
  - Finding/filling Customer Relations and Performance Management Positions
  - Team Dynamics/Building Support for Management
  - Facility Redesign for Future Revaluations