MEMORANDUM
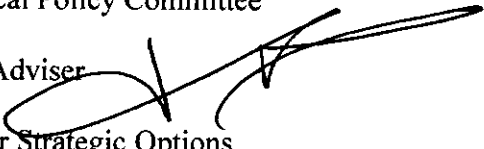
October 21, 2019

TO: Government Operations and Fiscal Policy Committee

FROM: Dr. Costis Toregas, Council IT Adviser

SUBJECT: MC311 Customer Service Center Strategic Options

PURPOSE: No decisions are to be taken in this worksession. The Committee will review information regarding factors influencing the performance of the MC311 center and explore alternative actions that can be taken to strengthen it.

The following are expected to attend:
   Barry Hudson, Director, Public Information Office
   Brian Roberts, Temporary Manager, MC311

In addition, the following will be present to address detailed questions:
   Mike Tarquinio and Todd Harper (DTS)
   Stephen Heissner, Senior IT Specialist and Katherine Johnson (MC311)
   David Gottesman (CountyStat)

Summary of Staff Recommendations:
   1.   There are no decisions to be made during this worksession. The Committee requested a "deep dive" into factors contributing to weak performance of the MC311 call center that was discussed during the most recent budget review on April 11, 2019.
2.   During the budget review session, the following two recommendations were made by Council staff:
   a.   *Consider moving up the decision to install a "next generation, possibly cloud-based 311 solution" sooner than currently foreseen (beyond 2020) and establish objectives for both departmental performance and customer ease of use and improved experiences regarding information and services.*
   b.   *Request that a utilization/staffing study be undertaken in FY20 to ascertain alignment between performance goals and staffing and take steps to improve this alignment if warranted by the 2019 OLO study on MC311 performance. Especially since the third-party back up resource has been eliminated, it is vital to ensure that resources match demand in a predictable manner. Any external costs for such a study should be supported, as the results could lead to significant cost savings. (This recommendation is carried over from the FY19 budget review; no progress has been reported to date.)*
   The OLO study reviewed as Item 1 in the October 24, 2019 GO worksession begins to address recommendation b. The Executive branch should follow up with a detailed study that would prepare and substantiate the personnel requirements for the 2021 budget request.

Setting the context

To County residents who call MC311 to ask for information or request a County service, their satisfaction is measured by the actual fulfillment of the service. And yet, the successful completion of service requests (and sometimes information requests) is not the sole responsibility of the MC311 Customer Service Representatives (CSRs). Many times, that completion is in the hands of the operating department that is resourced to perform the specific, requested task. The figure below shows the two responsibility circles (I and II) for MC311 calls.

I Under the direct control of MC311

II Under individual service department control
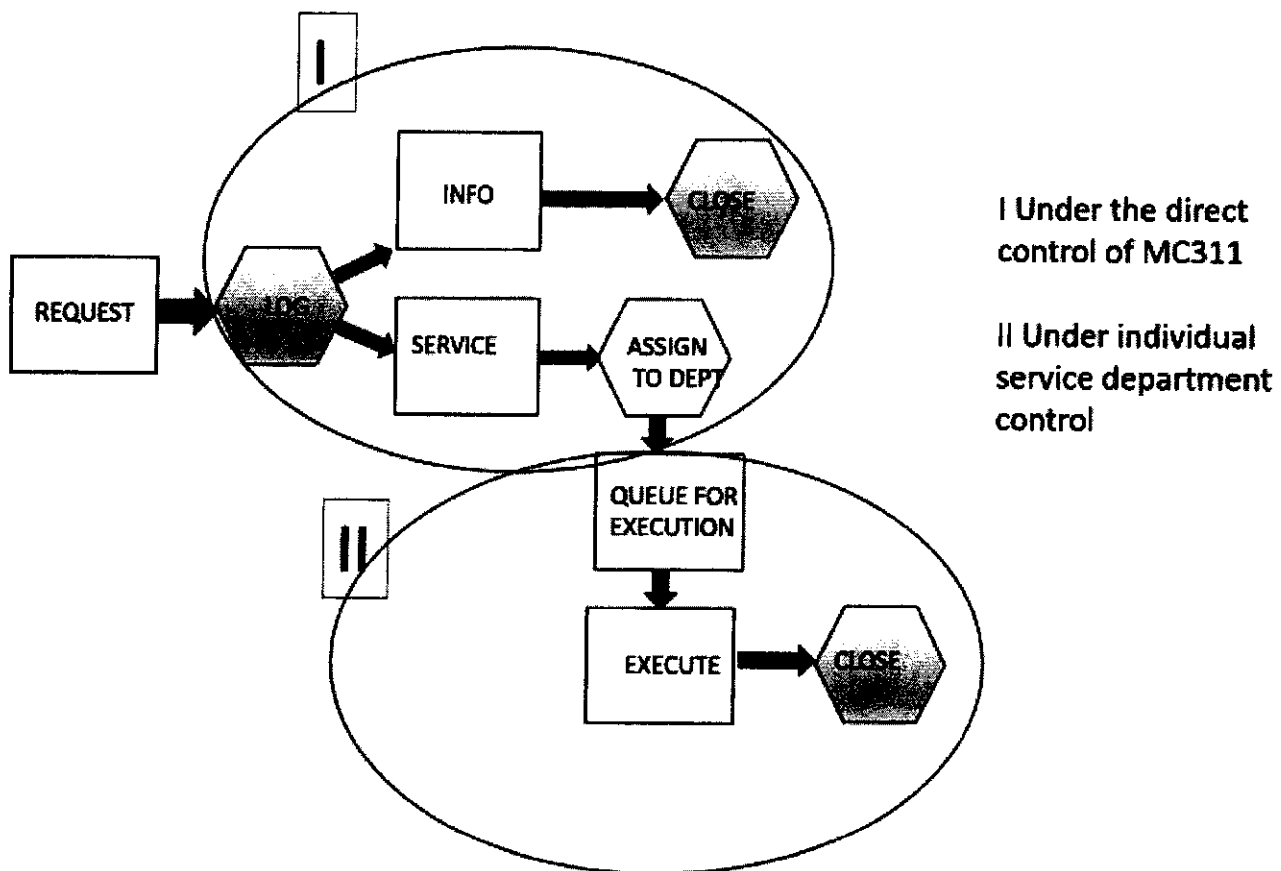
This separation of responsibilities brings confusion as to just who is managing the "end to end" experience of the County resident, and leads to claims of problematic performance of the MC311 Center when in fact the fault may lie elsewhere. To reduce the confusion and improve accountability, the CountyStat office regularly reports on and reviews departmental performance, comparing Service Request fulfillment against Service Level Agreements (SLAs) that convey the expectation of how long it should take to complete a given Service Request.

Worksession discussion flow

The MC311 management representatives will present an overview of MC311 performance (referring to the diagram above, they will concentrate on circle I). Their presentation is provided in advance as ©1-3.

They will be followed by representatives of CountyStat, who will present the current strategy that is used to manage circle II on the diagram.

Once these presentations are complete, the Committee may want to consider and discuss the following issues to define needed change strategies.

1. Why MC311?

   The original charter for MC311 contained three goals:

   a. streamlining customer access;
   b. reducing costs through consolidation; and
   c. collecting data to manage performance of departments.

   It is now 10 years later and time to reimagine MC311. Some of the goals have been accomplished (#b) and new opportunities have come into the picture (cloud technology, widespread use of apps, to name but a few). The new County Executive has a chance to formulate new goals and drive performance that supports them. PIO, DTS, and CEX have begun the process of thinking through what is next for MC311 and how to get there. The Committee may want to contribute their own ideas to this rethinking process, as MC311 is really the customer-facing portal for all County functions, including those of high concern to Councilmembers.

2. Current analysis suggests the following process areas worthy of consideration:

   a. Ways to reduce incoming calls through new technologies such as bots and smart phone apps. Technologies such as Citibot (see www.citibot.io) can provide automated responses to popular questions that do not need human intervention. Similarly, one of the most popular MC311 requests is "arrival time of the next Ride On bus"; many jurisdictions provide this information through automated systems at the bus stop kiosks or on an app, thus freeing CSRs to focus on requests needing concentrated attention and human interface.

   b. Stepping up the SLA management process that ensures, in a transparent manner, departmental performance against targets. CountyStat has provided the following information on this topic:

      All SLAs are reviewed annually (May/June timeframe to permit any necessary re-set each July 1); factors considered for each SR are: the current SLA, the volume of SRs, the median and average number of days to close, the 80th percentile days to close, the % meeting SLA, plus input from the department, the assigned MC311 Business Analyst, and CountyStat. In any given year, anywhere from a handful to around 100 SRs can get new SLAs based on this evaluation – new SLAs can be both shorter or longer than the prior SLA based on performance, resources and what is a reasonable public expectation. For example, from FY19 to FY20 there were 64 SRs assigned new SLAs and two SRs that were recategorized to GI. Of those 64, five were given shorter SLAs by an average of seven business days and the remainder were lengthened by an average of two business days.

In addition, the Executive provided the following table of closure rates for departments that indicates a good level of performance:

MCG-wide closure rate of all SRs								
FY18-Q1	FY18-Q2	FY18-Q3	FY18-Q4	FY19-Q1	FY19-Q2	FY19-Q3	FY19-Q4	FY20-Q1
92.77%	94.30%	95.10%	94.80%	94.71%	95.92%	91.70%	94.02%	94.74%

c. Staffing levels and needed flexibility

The OLO report (GO Agenda item #1) provided a detailed look at the challenges around staffing the MC311 Center. Most compelling was the review of MC311 CSR positions in 2019, which is reproduced here as ©4. It underscores the extreme variability of staffing, shows significant understaffing for many months under review in relation to the approved positions in the budget (40) and gives a possible explanation for the negative perception of MC311 performance indicators. Already, the indicators around Abandoned Call Rate and Average Seconds to Answer are stronger in September than in other months (see ©5-23). During the budget review for FY21, it will be important for the Committee to understand the basis for the requested budget and how the number of CSR staffed positions will be maintained at the targeted level.

d. Quick technology enhancements

Several items in the current system need quick attention while discussions are underway for major improvements; they include:

➤ enabling the email and SMS notifications in the Siebel/Oracle CRM system;
➤ configuring the Siebel CRM system to allow photo attachments;
➤ recovering the 18 months of data currently unavailable and hampering performance analysis; this dates from the time that MC311 made its physical move to the current Rockville Pike location. Council Staff is not aware of the details of this problem, and the Committee may want to understand options for going forward.

3. Quality of service

Success has been measured in prior discussions by three overarching indicators: attainment of performance goals, continued improvement in Service Level Agreement (SLA) completion by departments, and positive internal and external customer feedback.

The OLO report suggests several improvements to the performance indicators; those recommendations should be pursued and implemented in the upcoming budget cycle for FY21.

In addition, new processes to track MC311 users' experiences and perceptions of quality could include:

a. using surveys (both current users and open cohorts) to reach a more representative group of customers. These surveys can be specific to MC311 or part of the biannual resident services survey conducted by the Executive;
b. using Instant-Feedback Comment Boxes on KBAs to solicit immediate feedback on KBA quality from all users;
c. translating KBAs into more languages with high quality;
d. using focus groups to determine if KBAs are written in language that is understandable and responds to the question raised.

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4. Better utilization of MC311 data in budgeting and policy discussions with departments is a goal that can serve the Committee and full Council. SLA fulfillment data can indicate well-functioning service departments or weaknesses in funding support that cause resident concerns. Geographic analysis of incoming requests or completed requests can prepare Councilmembers before meeting with resident groups, and online access to MC311 data is available to all Council offices today. In addition, MC311 data also reside in dataMontgomery on the County's open data platform.

The Committee may want to request MC311 briefings, especially for new Council staff, to enable better utilization of the capabilities or the MC311 system.

The Executive has provided this overview of utilization, which shows how this data is used by management:

This data is prepared and provided to departments, MC311 BAs, CountyStat analysts, and OMB analysts every quarter; in addition there are also tools such as scatterplot graphs that shows SR frequency vs. closure rate which are available. Departments that use MC311 more in their day-to-day work (DEP, DHCA, DOT, etc.) do use MC311 data for tasks such as planning, performance management, and contract management.

5. The Council and Executive have launched a year-long Racial Equity initiative. The MC311 system can become an active part of this initiative by supporting practical, measurable improvements of the indicators of concern and responsiveness through data captured by the system. The Committee can engage Executive staff in a discussion around this goal.

The MC311 Data Summary

Data from 9/1/2019 – 9/28/2019 (four weeks)

Top 15 Service Requests

Rank	Dept.	Service Request	#	Previous Period	Council District*				
					1	2	3	4	5
1	DEP	Bulk Trash Pick-Up Request	3082	3213	930	58	174	746	983
2	DEP	Scrap Metal Pick-Up Request	2481	2660	727	279	125	587	641
3	DEP	22 Gallon Bin Delivery	1886	1910	405	485	129	401	283
4	DPS	Schedule Residential Inspections	1372	1520	90	19	10	40	45
5	DEP	22 Gallon Bin Pick-Up	926	878	219	193	69	205	123
6	DOT	Inspect, Remove or Prune County Tree	758	808	278	84	58	186	127
7	DHCA	Housing Complaints	654	728	82	135	45	171	147
8	DHCA	Landlord Tenant Issues	579	582	109	84	51	90	123
9	DEP	Unacceptable for Collection	471	638	277	5	30	88	63
10	DEP	Cart Repair (Paper Recycling)	470	458	135	73	34	129	87
11	POL	Dead Animal Along the Roadway	440	341	115	47	54	86	67
12	DEP	Field Check for Solid Waste Services	422	439	116	64	31	127	62
13	DPS	Schedule Commercial Bldg. Inspections	407	421	34	8	11	13	11
14	HHS	Income Supports Case Mgr. - Rockville	395	367	51	13	87	159	17
15	FIN	Request to Discuss Property Tax Bill	394	252	33	19	23	20	7

Top 15 General Information Requests

Rank	Dept.	Information Request	#	Previous Period
1	DOT	Ride On Real Time Arrival Info	1916	1952
2	FIN	Payments Made on a Property Tax Account	845	287
3	FIN	Balance of Property Tax Bill	823	628
4	DPS	DPS Building Inspector Contact Info	711	842
5	DEP	How To Recycle/Dispose of Solid Waste	649	771
6	PIO	MCG Employee Directory Assistance	624	662
7	DPS	Permit Status	575	623
8	DOT	Ride On Trip Planning	516	523
9	FIN	Tax Payment Methods	430	204
10	POL	Police Department Information	401	467
11	DEP	Transfer Station Questions	348	445
12	HHS	General HHS Information	331	225
13	HHS	Status of Income Support Benefits	320	323
14	DEP	Curbside Recycling Program Questions	310	278
15	DEP	Literature Items – Trash/Recycling	300	355

Call Center Performance

Calls and Requests		Abandoned Calls		Call Times	
Total calls received during call center hours	37,723	Abandoned call rate (target: <5%)	6.84%	Average seconds to answer (target: <20)**	72.0
Total requests (inc. phone, web, walk-in)	44,646			Average call duration, seconds (target: <240)	262

* Location data are not consistently available for all requests.
** Seconds to answer does not include the time a caller spends listening to the automated MC311 greeting.

OLO OFFICE OF LEGISLATIVE OVERSIGHT

- The 2019 fiscal year began on July 1, 2019 and MC311 again received large numbers of service and information requests related to residential property taxes:
  - MC311 received 845 calls from residents to request information on payments they had recently made on their property tax accounts, nearly three times more than the 287 requests received during the previous period.
  - A total of 823 residents requested the balance of their property tax bill, 31% over the 628 requests from the previous period.
  - MC311 took 430 requests for information on tax payment methods, over twice the 204 requests from the previous period.
  - A total of 394 residents requested to discuss their property tax bill, 56% over the 252 requests received previously.
- MC311 received 440 service requests regarding dead animals along County-maintained roadways, 29% over the 341 requests received during the previous period and 37% over the 321 requests received during the corresponding four-week period in 2018. The County Police Department's Animal Services Division is responsible for retrieving dead domestic animals (dogs, cats, etc.) and other dead animals the size of a possum or larger from County roadways and adjacent property. Removal requests are generally completed within 24 hours.

MC311 Spotlight: Police Information Calls

MC311 received 5,259 calls from residents wishing to provide information to the Police Department between October 2018 and September 2019. MC311 Customer Service Representatives will transfer callers who wish to be seen by the police to their non-emergency number or if they do not wish to be seen by the police, to their closest police district station.

As shown below, the number of monthly calls during this 12-month period declined during the winter months, reaching a low of 326 calls in December 2018, before peaking in the summer months with highs of 514 and 516 calls in May and June 2019, respectively.

Police Department Information Calls, Oct 2018 - Sep 2019
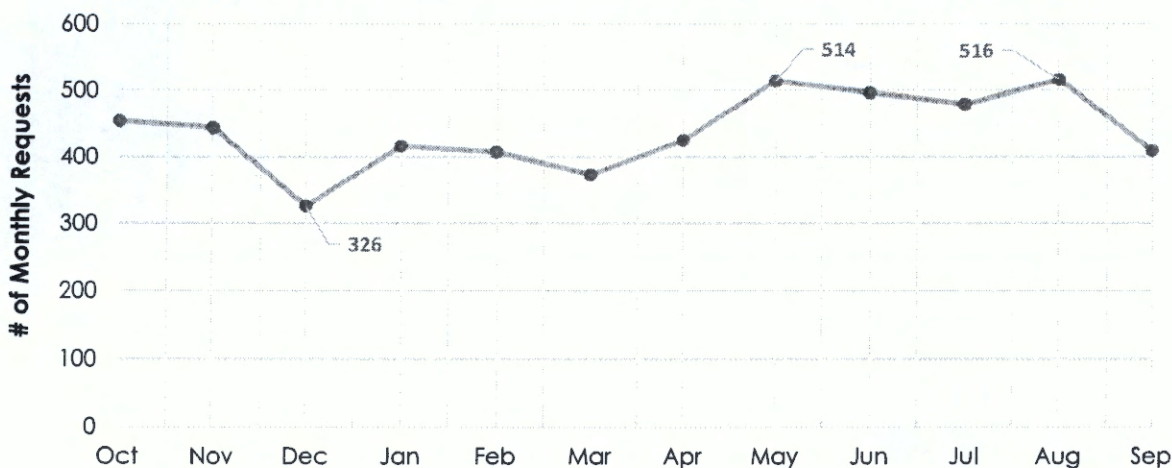
MC311 Monthly Call Center Data Summary

Data from 9/1/2019 to 9/28/2019 (2019) and 9/2/2018 to 9/29/2018 (2018) (four weeks)

Call Center Summary

Year	Total Phone Requests	No. of CSRs* Average/Day	Abandoned Call Rate
2019	37,723	30	6.84%
2018	37,383	28	9.78%
2019 (3rd Quarter)	128,700	31	7.15%
2018 (3rd Quarter)	122,704	28	10.19%

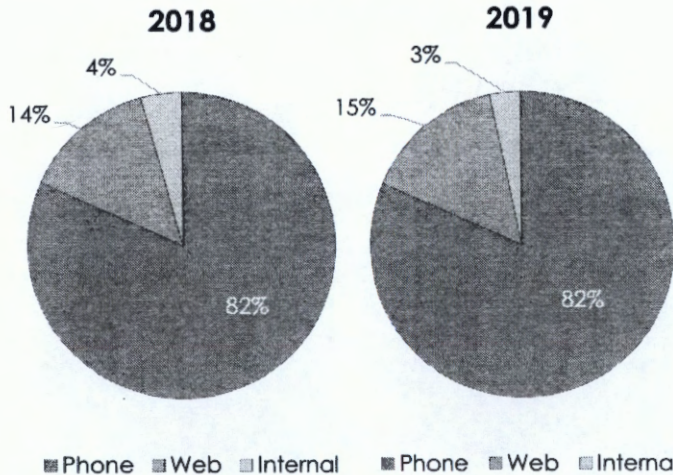* Number of Customer Service Representatives (CSRs) available to answer calls.

Top Five Departments Receiving the Highest Number of Requests

2019				
DEP (13,093)	DOT (6,684)	DPS (6,179)	HHS (4,124)	FIN (3,909)
2018				
DEP (12,030)	DOT (7,497)	DPS (5,785)	FIN (4,392)	Non-MCG (3,694)

Source of Requests**

2018

4%
14%
82%

■ Phone ■ Web ■ Internal

2019

3%
15%
82%

■ Phone ■ Web ■ Internal

** Does not include requests received by Twitter, email, or from walk-ins.

Requests for English- and Spanish-Speaking CSRs

Requests for English-Speaking CSRs: 31,915 (2018), 31,778 (2019)
Requests for Spanish-Speaking CSRs: 1,416 (2018), 1,280 (2019)

■ 2018   ■ 2019

Year	Top Three Request Solutions: English-Speaking CSRs	Top Three Request Solutions: Spanish-Speaking CSRs
2019	Ride On Arrival Info (1,753), Bulk Trash Pick-Up (1,134), Residential Inspections (1,105)	Residential Inspections (108), Bulk Trash Pick-Up (99), DPS Building Inspector Contact Info (50)
2018	Ride On Arrival Info (2,091), Residential Inspections (1,206), Property Tax Bill Balance (945)	Residential Inspections (112), Bulk Trash Request (87), DPS Building Inspector Contact Info (67)

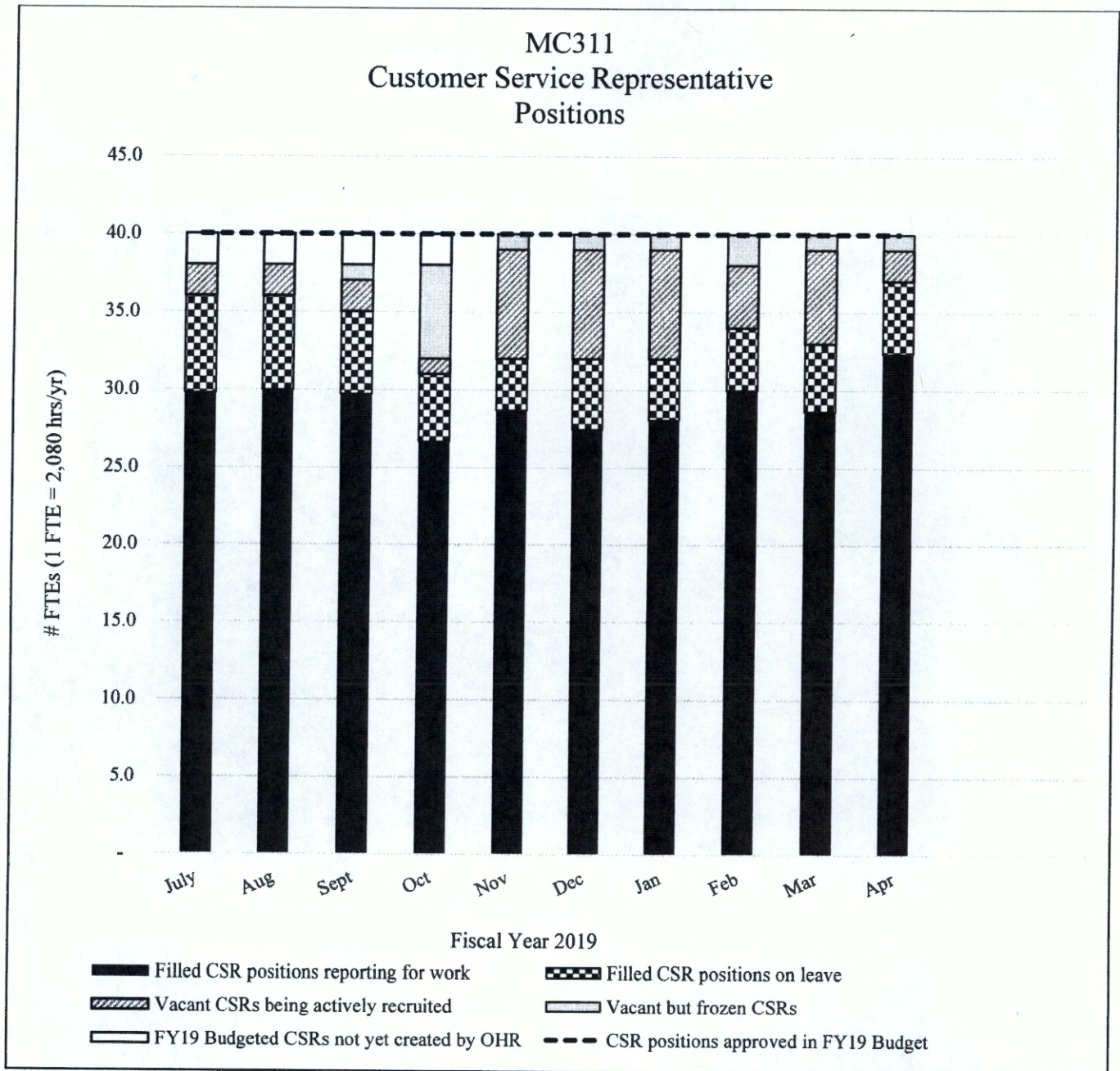**Figure 13: MC311 Customer Service Representative (CSR) Positions, FY19.**

MC311
Customer Service Representative
Positions

Fiscal Year 2019

Legend:
- ■ Filled CSR positions reporting for work
- ▨ Filled CSR positions on leave
- ▨ Vacant CSRs being actively recruited
- ▨ Vacant but frozen CSRs
- ▢ FY19 Budgeted CSRs not yet created by OHR
- – – – CSR positions approved in FY19 Budget

Figure 13 shows the number of full-time CSR positions approved in the FY19 budget. Over this period, there was a gap between the number of budget-approved CSR positions and the actual number of CSRs available to work. The gap was comprised of four components:

1. Budgeted positions not yet created by OMB in County employment system.
2. Vacant positions in the County employment system that were subject to the County hiring freeze.
3. Vacant positions that OMB exempted from the hiring freeze and for which OHR was actively recruiting.

MC311 Briefing

Barry Hudson, Director
Public Information Office

October 2019

Background

MC311 went live in 2010 as part of Tech Mod, a large-scale CIP project that modernized how the county conducted business.

It encompassed:

- ERP System Implementation (Oracle eBusiness)
- MC Time Implementation (Kronos)
- MC311 Contact Center (Avaya, Siebel)

Included a steering committee and $80M CIP budget.

https://montgomerycountymd.granicus.com/MetaViewer.php?view_id=150&clip_id=158&meta_id=97782

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General Information

Hours of Operation

- Monday through Friday, 7 a.m. to 7 p.m.
- Online access available 24/7/365, www.mc311.com

Staffing

- 40 Customer Service Representatives (CSRs) Budgeted
- 37 current employees, 3 in the hiring pipeline
- Average CSR handles 67 calls per day and 17k per year
- Two CSR skill levels: Tier 1 and Tier 2
- 12 Spanish Speaking CSRs
- Over 2,000 requests for service daily
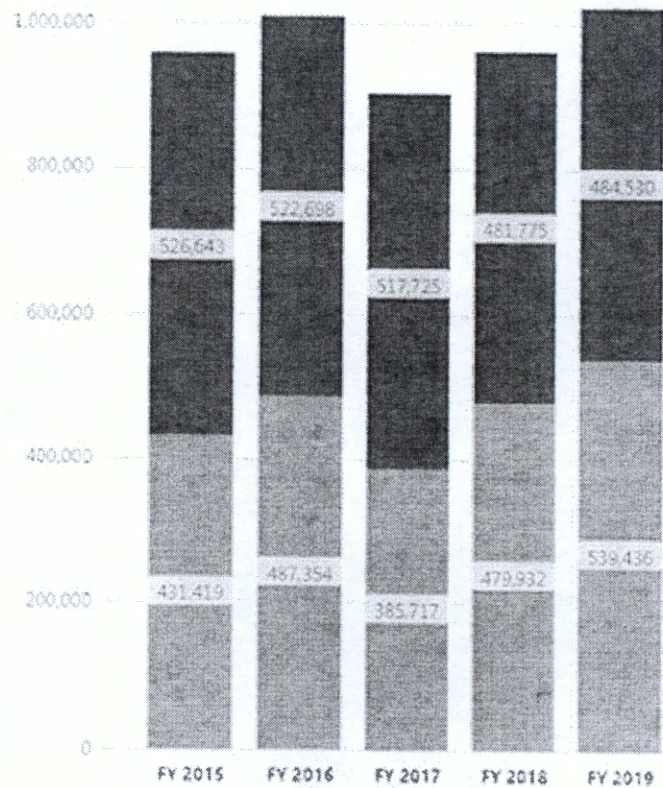- 486K service requests entered by CSRs per year

Call Volume

- Annual: 486,502

- Average Monthly: 40,541

- Average Daily: 1,835

- Busiest Month(s): October, August, May

- Busiest Time of Day: 9AM to 3PM with spikes between 10AM and Noon.
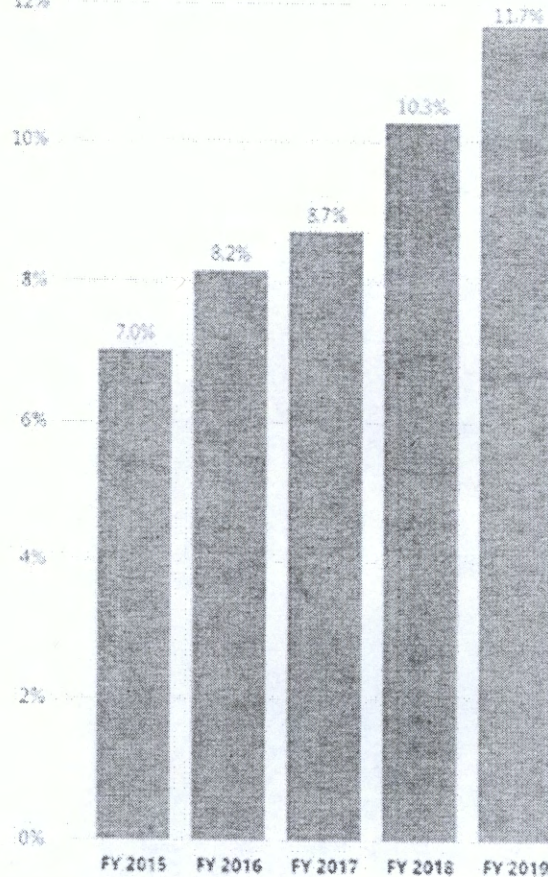
Request Volume

Calls & Web Visits

● Web Visits ● Calls

Percent of SRs From Web

From FY15 to FY19, the total number of MC311 contacts (phone and web) increased by **7%**, while web visits increased by **25%**.

The proportion of service requests generated online increased by **67%**.

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Top 5 Requests by Department

- DEP Bulk Trash Pickup

- DEP Scrap Metal Pickup

- DOT Ride-on Arrival Information

- DPS Residential Inspections

- FIN Property Tax Billing Questions

Knowledge Base Articles (KBAs)

- Information about non-emergency government services available by calling and online

- Number of KBAs = 3,605

- Content is provided by the departments

- Maintained by the departments in conjunction with 311 Business Analysts.
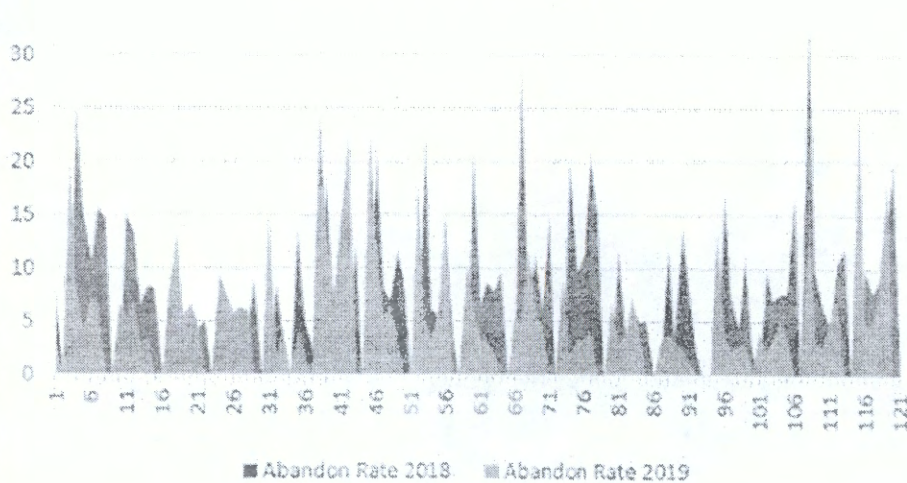
Recent Improvements In Service

June through Sept Comparison 2018 to 2019

- Abandon Rate improved by 30.57%
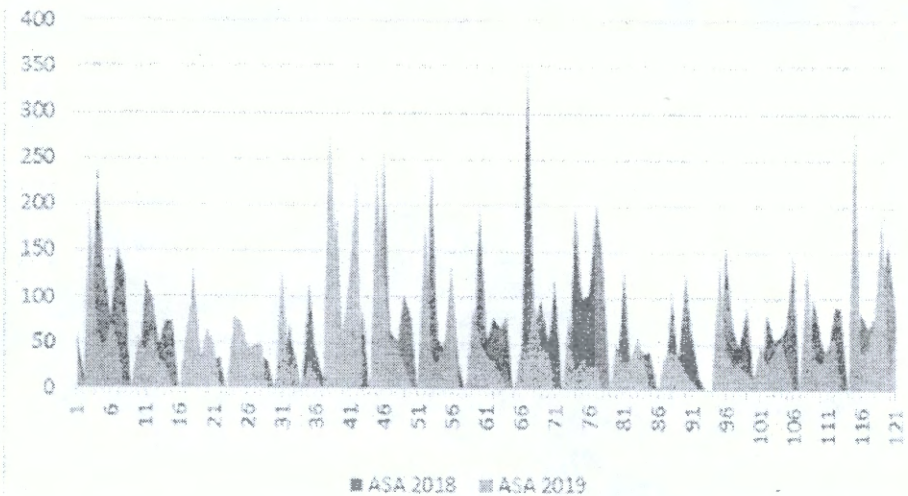
- Average Seconds to Answer improved by 23.95%

Key Measure	Jun-Sept 2018	Jun-Sept 2019	% Change
Abandon Rate	10.14%	7.04%	-30.57%
Avg Sec to Answer	87.7	66.7	-23.95%
Calls Answered	160,845	169,845	+5.60%
Avg CSR's Available	28.34	30.97	+9.28%

Abandon Rate Comparison

■ Abandon Rate 2018   ■ Abandon Rate 2019

Average Seconds to Answer Comparison

■ ASA 2018   ■ ASA 2019

Issues We Are Addressing

- Staffing to meet demand: Erlang C suggests 45 CSRs needed to meet current performance targets*

- Keeping Knowledge Base Articles current

- Getting timely updates from departments about events that drive incoming call volume and/or new call types

- Handling complex call types that are not typical of 311 operations nationally

*As published in recent OLO Report

Public Information Office

Calls Are Getting More Complex

Increase in call complexity (added OHR, DPS queues)

FY19 Handle Time By Queue	ACD	ACW	Total
English	3:08	1:03	4:11
Spanish	3:43	1:02	4:45
DPS Tier 2	3:59	1:18	5:17
FIN Tier 2	4:47	1:15	6:02
OHR Tier 2	6:16	1:29	7:45
HHS Tier 2	6:23	1:58	8:21

Propensity to Abandon

Tolerance – how long will callers wait in queue before hanging up?

Measurement	Wait Time (m:s)
Mean	2:54
Median	2:00
Mode	1:03

Source = Contact Analyzer 10/1/18 through 9/16/19 data.

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Solutions We Are Implementing

Enhanced qualitative and quantitative analysis of MC311 users:
- Channel-specific (Web/Phone) "in person" Focus Groups for exploratory research.
- Quarterly customer surveys to measure satisfaction and capture customer perception.

Deployment of Quality Assurance Best Practices:
- Flagging of high value calls
- Improved QA form design
- Evaluator calibration sessions
- Tie Quality Assurance observations to agent training and development
- Increased evaluation frequency rate of customer interaction

Solutions We Are Implementing

Process:
- Operational Analysis – Identify call types handled by subject matter experts in departments rather than by MC311 to improve customer experience.

Staffing:
- Fill vacancies faster
- More creative staffing approaches such as temp and part-time positions for peak hours

Technology:
- Incremental Enhancements to existing system – Ability to upload photos with web service requests, Publish KBA last updated date, etc.

Current State Technology

Oracle Siebel still ranks as a leader in Gartner's Magic Quadrant while Salesforce ranks as the leader of the leaders in 2019. Gartner uses qualitative data analysis methods to demonstrate market trends.

Figure 1. Magic Quadrant for the CRM Customer Engagement Center
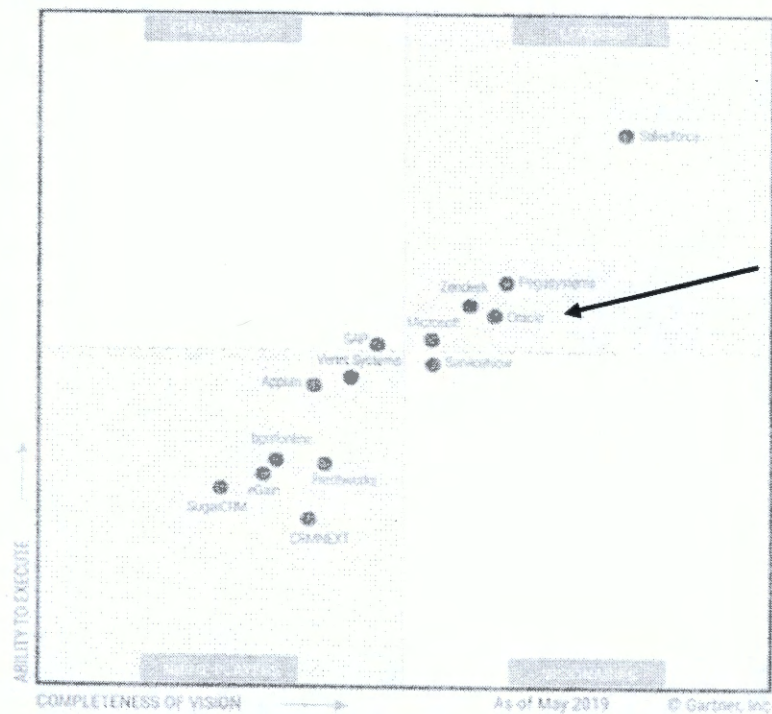
Siebel 2016 is current version being used. Two successful upgrades performed since go-live in 2010. However, enhancements are desired such as supporting additional customer channels, call recording and workforce optimization on the Telecom side.

Building for the Future

KBA Improvements

- Briefed CAO and key department heads on importance of improving KBAs and communication with 311 staff to improve service request fulfillment to customers

Council Liaisons

- In the process of identifying a point person(s) to work with Council staff to resolve resident concerns

Budget Collaborations

- Will work with key departments to address short- and long-term customer service needs through the budget

Building for the Future

- Exploring technology enhancements with DTS to improve service to customers, including texting, automated email acknowledgement, latest KBA update date stamping, etc.

- Transform County Web site so it is more customer service friendly and expand access for customers

- Charged by CAO to work with DTS to develop long-term customer service and access plan

Building for the Future

- Establish a Service Excellence Program (quality assurance) and re-establish CSR Incentive and Recognition Program

- Establish quarterly meeting with key departments to discuss KBAs, performance data, department process changes, process improvements, and new initiatives

Future State

Objectives	Focus
Diversify Service Channels – more self-service options including chatbots, AI. Example – answer next bus calls without routing to a CSR, integrated with CRM for data capture and management reporting	Customer Facing
Make website more customer friendly	Customer Facing
Call Recording and Workforce Management optimization for forecasting and scheduling	Internal Facing
Adapt to future trends in mobile communications	Customer Facing

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Q & A

MC311 Briefing

Barry Hudson, Director
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October 2019