Technical Bulletins: Good Service Request Systems Keep Customers Happy

Beth Birmingham
Municipal Technical Advisory Service

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Good Service Request Systems Keep Customers Happy

By Beth Birmingham, MTAS Intern

A citizen calls your city hall about a pothole, a burned-out street light, or a rude sanitation worker. Who takes the call? Who follows up? Who ensures the customer's satisfaction? And is anyone keeping track?

Across the United States, cities use a variety of systems to handle daily service requests — and yes, complaints — from their customers. By learning some of the essential elements key to a successful system, you can plan such a system based on your city's needs and resources.

Many towns still use manual systems, but the emphasis here is on computerization. Automated service request systems are proven to be cost-effective, labor-saving devices that greatly enhance management efficiency. There are a number of commercial software packages available that are both microcomputer-based and fairly inexpensive. Some of the leading software names are discussed in this report.

For a service request procedure to be effective, five key questions must be answered:

1. Who takes and records the calls? Or takes down the information when a citizen drops by city hall?
2. How is each request assigned to the appropriate department, and who does it?
3. When and how does the city get back to the citizen concerning the request? How many times is the citizen contacted (for example, a letter to the citizen acknowledging the request, a status report, and a note upon completion)?
4. Does the citizen have an opportunity to assess city hall's performance?
5. Who's responsible for monitoring the status of each request or complaint? Is a status report generated listing open concerns?

Question No. 1

Who takes and records the calls?

There are several methods for receiving and recording citizen service requests and complaints. One way is to give the job to the staff person who answers the phone. This could include anyone from the mayor or mayor's secretary to city councilmembers or individual department heads.

If this method is chosen, any city worker who ever answers a phone must receive training on how to respond to citizen calls. The person taking the call would also be responsible for keying the information into the central computer.

Entering the request gives access to anyone who needs to check the status of unresolved requests. The request would also be automatically routed to the appropriate department for service. This method is an excellent way to prevent the "run-around" and showcases the advantages of keeping the records on computer.

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Many cities have had success with a hot line or central phone number, staffed by trained employees whose sole responsibility is to receive and record calls on the computer. (Again, the computer can automatically alert the responsible department for service.)

Sometimes the central number is located in the mayor or city manager’s office where the calls are taken, recorded, and routed to the appropriate department by a secretary or the city manager. Elected officials and their staffs may be responsible for receiving and recording calls, or receiving them and sending them to the city manager, who enters them into the computer.

A few cities have dispatchers taking service requests 24 hours a day, while others have answering machines to record requests and complaints after hours and on weekends. In some cities, officials are available in shopping malls one day a month, while other cities simply place easy-to-use computer terminals in the malls so citizens can enter the request themselves.

Any time a central number or other centralized system is used, it must be well-publicized so callers won’t get the runaround. When someone answers the phone who has nothing to do with service requests, this person can only transfer callers to someone else. Even if the employee directly connects the citizen to the central number, the caller may still be forced to repeat the request from the top. And doesn’t that make you mad?

Ideally, a centralized system prepares individual departments to receive and document calls coming through to them. The departments should either take responsibility for the request or complaint themselves or refer the information to the appropriate department through the central number. In either case, the department should forward the information to the central office for filing.

Many cities have no centralized system and put the entire responsibility of calls on individual departments. Each department must take and document the call, track it, and get back to the citizen. There’s certainly an opportunity here for a request to fall through the cracks. And, to prevent runaround, each department must be prepared to take and record even those calls it can’t service, then forward all the information to the appropriate department. Although all information is centrally recorded on computer, nothing is channeled through a central office. For maximum efficiency, the city’s phone book listing should be revised to include descriptions of the type of service performed by each department.

Question No. 2

How is each request assigned to the right department?

Normally, if a commercial software package is used, the request is automatically assigned to the appropriate department at the time it’s keyed in to the computer. This way, whoever takes the call simultaneously forwards it. Some software packages automatically generate a hard copy of the work order for the appropriate department and will prioritize each request by giving it a code number.

Once the information is properly forwarded, the department must be accountable to someone else in its hall, thus ensuring follow-up. This can be done in two ways. In some cities with a centralized system, the department reports back when the request is handled to the community services office, the mayor or city manager’s office, or to the location of the central number. In other cities, all information forwarded to the responsible department is also sent to the city councilmember for that constituency. As actions are taken, notations are added to the original service request or complaint.

Ideally, everyone involved should have access to the service request record and updates, thus maximizing status tracking. Several tracking software packages can produce a case list of unresolved requests and complaints to be investigated by each relevant department.

Question No. 3

How and when does the city get back to the citizen?

 Constituent Response 1.8

- Automatically handles inquiries from constituents, responds to their requests and complaints, and builds a database of their concerns and interests. Helps to resolve inquiries by recording the information and directing the matter to the appropriate department/individual for follow-up.

Has an online, issue-sensitive script feature that allows instant response to constituents for those issues for which a response has been previously prepared. Automatically prints follow-up letters to the affected department/individual responsible for following up on the inquiry. An interim letter may be sent to the citizen at this time. When the department/individual has responded, a follow-up letter is then sent to the constituent. The system is supplied with a word processor allowing users to produce custom letters of their own. Optionally the system will export letters to industry standard word processing applications such as WordPerfect, Microsoft Word, etc.

- Provides reports to assist the user in spotting emerging trends, evaluating the performance of departments/individuals, and assessing the mood of the public. Detailed reports are also available to keep a history of the inquiries in election years. User defined miscellaneous codes are available for sorting inquiries and reports by user requirements. For example, miscellaneous code 1 may list all inquiries received from city councilmembers. LAN version available.

American Municipal, Inc.
2496 Long Hill Rd.
Guilford, CT 06437
1-800-926-6864

The Public Manager
Complaint Management System

Provides municipal, county, and state officials with a systematic mechanism for responding rapidly to citizen requests and complaints, communicating with citizens, and monitoring staff performance. Records all complaints, generates immediate response letters to citizens, produces department referral forms for prompt remedial action, and final letter telling citizens about actions taken in response to complaints, generates variety of detailed and summary reports, including lists by department, district, category, status, and trend, for any date. Allows users to develop their own complaints and descriptions. Links to standard processing packages for customized letters. LAN version available.

Metro Technology Services, Inc.
1410 Russell Road
Daylesford, PA 19301
(215) 296-0346
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About The Author

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Acknowledgments

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It's important to keep in touch with citizens who have asked for service or complained. If the request is made in person or on the phone, the first contact is to acknowledge receipt of the request and thank the citizen for the information. Some cities also contact the citizen immediately to let them know who will handle the request and when. Typically, a phone call-back is made. The program merges data with population files, and tells the citizen which department will handle the request, and to whom the citizen should write a letter if they are dissatisfied with the department's response. If the request is made in writing, the letter is mailed or faxed, and the citizen is given a tracking number. The department that receives the request contacts the citizen to verify the information and to ensure that the problem is addressed.

When acknowledging receipt of a service request by letter or phone, it's typical to give a date the request will be handled, and to name the department handling it. In a centralized system, it's a good practice to have the department give the citizen a call back the same day. It may be best, since many problems may be resolved before a letter is received. Call-backs are significantly less expensive for towns with a lot of citizen service requests. Charlotte, N.C., aims for one-day call-back. The citizen is told when the work will be done, that the work is completed, or why it can't be done at all. Most cities will track work progress for any citizen who asks.

Many cities only make contact with a citizen when the request is satisfied. Towns with smaller budgets, and those with a large amount of service requests, should remember a phone call is cheaper than postage. Another option is to leave a notice at the citizen's door after the work is done. Tri-Com's Public Manager complaint software will automatically produce a letter to go out the same day a request is received, thanking the citizen and telling him or she which department will handle the matter. Public Manager also helps the staff produce a follow-up letter telling the citizen about action taken. The program merges data with popular word-processing packages such as WordPerfect. Tri-Com can access any one of the word-processing packages it supports without having to exit the program.

Question No. 4
Are citizens given an opportunity to assess staff performance?

Many cities give citizens a chance to evaluate the service by providing pre-addressed, postage-paid response cards. These may be automatically mailed when a request or complaint is received, or mailed or left at the citizen's door after the work is complete. Citizens are sometimes asked to return the cards to individual departments, but they're usually sent to the city administrator or mayor's office. Some local governments send evaluation cards periodically to a set number of randomly selected citizens to get a reading on community satisfaction.

Elk Grove, Ill., is an example of a town keeping up with the satisfaction of its citizens. "Communication cards" are sent to 20 percent of the community at a time, eventually covering the entire community. The town also puts communication cards in its quarterly newsletter.

Question No. 5
Who's responsible for monitoring the status of a service request? Is a status report produced?

Most cities run a routine status check to monitor progress on each request or complaint. A community service office or the central office that received the request usually is responsible for following up. When a department takes action and/or completes the work, this information must be entered into the computer so it won't continue to register the request as open.

Although several authorized staff members have the freedom to check the computer daily for the status of requests, most cities use software that generates hard copies of status reports, which can be issued weekly or monthly to keep current information in the hands of the city manager and council. Tri-Com and C-Tracks are software with the ability to flag delinquent responses.

The leading complaint tracking software systems produce a variety of useful reports including:

- the number of requests within a specific time period
- action(s) taken and whether the problem is resolved
- who handled each complaint
- how long the work took
- the number of calls per department
- the number of particular types of calls within a department
- the number of evaluation cards returned, and
- number of calls per city ward or district.

The number of calls per city ward can be useful in pinpointing geographic problems. The software can match the locations of requests and complaints automatically against a citywide database, and coordinate and merge multiple citizen reports in the same area into one entry. Analyzing data by geographical area, along with the type of service request and responsible department, is helpful to identify trends and management problems. This information also comes in handy when predicting where similar problems may occur in the future.

Ward information is a useful tool in election years. It allows the city manager's office to provide elected officials with a list of all requests and complaints from their constituency, the names of the citizens, and the actions taken.

By using the chief components outlined in this report, your city can develop an efficient service request tracking system. Computers are a growing necessity as vendors continue expanding their software to include capabilities municipalities need. Listed below are leading software systems for request tracking, and a brief summary of what each has to offer.

C-Respond

PC-based single user or LAN complaint/service request tracking software. Five-part system provides an easy, flexible method for managing citizen input. Program prompts the user to enter the who, what, when, and where of an event, checking for duplicate entries. Responsibility can be assigned immediately to the appropriate department or placed in a pending file for future local review and assignment. Tracks the resolution on two levels: action updates and exception reporting that indicates follow-up and resolution in accordance with scheduled dates. Built-in text editor automatically generates specified letters. Analytic reports and statistics provide information for decision-making, to endorse budget and personnel recommendations, to determine resource allocation, and to indicate trends.

C-Respond is used by city managers, mayors and county executives, action centers, public works departments, building departments, service centers, and administration. Multi-user capability with unlimited users on LAN system.

AMTEC Southeast, Inc.
Clearwater, FL 34630
1-800-736-8275, (813) 572-8273
FAX: (813) 572-8278

C-Track

Database program to manage and track citizen complaints and work orders. Program includes forms for tracking complaints (or work orders) to and from departments for action and a personal letter for each citizen. Easy to learn and use. Menu-driven.

John R. Adamson
2601 33rd Ave., SE
Puyallup, WA 98374

Citizens Response Information System (CRIS)

A software solution for documenting the contacts citizens make with their local municipal and state government offices, whether an information request, a complaint, or a suggestion. At the time the contact with the citizen is logged in for tracking purposes, a return letter can be selected and reports can be generated on the type and frequency of all incoming calls and letters from the citizens.

TARP Information Systems
309 E Main St., Suite 204
Salisbury, MD 21801
(301) 546-2223
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Tri-Com Associated, Inc. 25 Science Park New Haven, CT 06511 (203) 786-5460

RFS (Requests for Service) and C&S (Codes and Services)

Program designed specifically to assist in handling service requests, with facilities for recording calls, assigning requests to the proper person or department for action, monitoring the time it takes for calls to be handled, responding to callers, and documenting solutions achieved by individuals and departments.

System is completely menu-driven, provides password privileges, and data transfer to other software for analysis. Expanded to handle code violations with capabilities of tracking scheduled inspections, issuing notices to code violators, and reporting for citation issuance. Single and multi-user versions available.

Metro Technology Services, Inc. 1410 Russell Road Daylesford, PA 19301 (215) 296-0346 FAX: (215) 648-0346

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The University of Tennessee
Municipal Technical Advisory Service
600 Henley Street
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