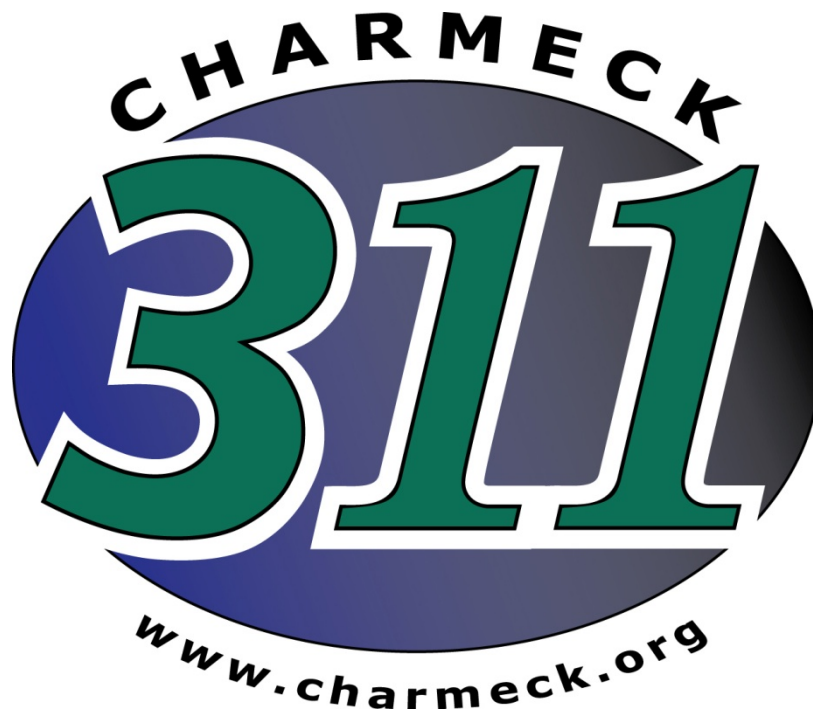


**CharMeck 311
City Manager's Office**



FY2013

Strategic Operating Plan – Final

July 16, 2012

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CharMeck 311 FY2013 Strategic Operating Plan

I. Executive Summary

Introduction

CharMeck 311 is a customer contact center that provides general information, creates service requests, and directs calls to other departments and agencies for problem resolution for internal and external customers in Charlotte-Mecklenburg.

CharMeck 311 received over 1.4 million calls for service in FY12 and received the 10-millionth call for service in August. The center had a very productive year, exceeding goals and delivering the best performance in three years across many categories. The center answered 80.7% of the calls in 30 seconds, which is well above the target of 70%, Abandoned calls (ABA) ended positively below the target with 3.1%, followed by 26 seconds Average Speed of Answer (ASA) showing improvements over last year's 57 seconds, and finally After Call Work (ACW) improved by 29 seconds ending the year with 50 seconds. Additionally 318,000 citizens elected self-service options, 410,000 service requests were entered and over 23,000 customers received face-to-face service at CMGC. The combination of improved services, increased productivity and higher efficiency placed the center in a favorable position. CharMeck 311 met 17 of the 19 balanced scorecard targets.

CharMeck 311's highest priority TPET request is the replacement of Emerald with a new Citizen Relationship Management (CRM) System. During FY13 CharMeck 311 will focus on exploring, obtaining and implementing more effective processes and technologies to better serve our citizens until funding for a CRM can be identified. This focus will create the opportunity for CharMeck 311 to expand customer service delivery on behalf of our partners and should allow for increased capacity for our partners to focus on core service delivery.

Summary of Resource Needs

	FY2010	FY2011	FY2012	FY2013 Budget
Budget	\$7,278,861	\$7,301,403	\$7,448,375	\$8,670,916
Positions (FTEs)	134	136	141	141

Change to Current Level: The current lease for CharMeck 311's Contact Center includes an increase of \$9919 in FY13. This change to current level is a "keep the lights on" type of request and is therefore named as the first priority. CharMeck 311 has identified savings in other line items to cover this additional expense.

Service Level Changes- Technology: As noted above, the most effective strategy to manage growth and improve overall productivity without additional resources is through technology. This includes offering self-service options via an enhanced web presence, an improved and expanded interactive voice response system (IVR), new mobile applications for Smartphones and a simplified agent desktop. All enhancements require investments to achieve long-term savings and cost avoidances. Additional professional services and skill sets are required to effectively leverage existing technology and to plan for future technologies.

For the fiscal year 2013 CharMeck 311 submitted one TPET request for the CRM project: Top priority for CharMeck 311 was the FY13 request for an additional 8.65 million for the replacement of Emerald with an enterprise Citizen Relationship Management (CRM) system with implementation beginning in

FY13. Funding and implementation of the new CRM tool set is key to seamless and accessible customer service. CRM is crucial for effective long-term service delivery and similar to Emerald, CharMeck 311 will be a major user of this system. In FY12 the severe risk fund identified 2.5 million. This request pursued the remaining funding for this enterprise project. Currently no additional funding was identified in the approved budget.

Vision and Mission

VISION: CharMeck 311 will be the trusted provider, and customer service leader connecting citizens to City and County services in the most cost effective manner by using the industry's best practices and technological advances.

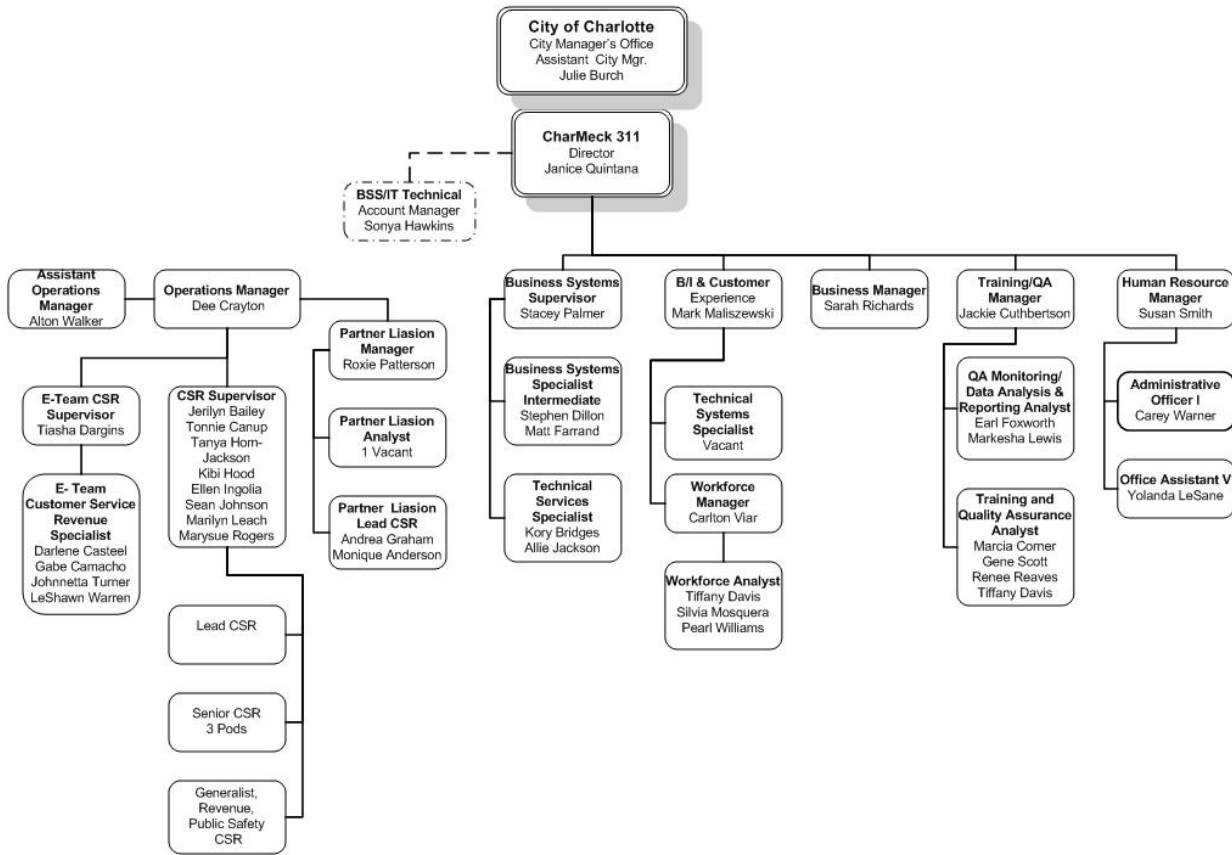
MISSION: CharMeck 311 is the customer contact center serving the citizens of Charlotte and Mecklenburg County. Our greatest resource, the CharMeck 311 employee, provides courteous, responsive service with integrity and quality in a changing environment.

CharMeck 311 Key Issues & Challenges

The most effective strategy to manage growth, increase cross trained CSRs, improve overall productivity and efficiency is through technology, particularly with a CRM solution. CharMeck 311 successfully implemented the Sheriff's Office Jail Central call volume without a CRM or additional resources. However, the variety and amount of call types that could be absorbed for this initiative and those going forward are limited without a robust CRM system.

As CharMeck 311 prepares to move forward in improving and expanding our service delivery to the citizens of Charlotte and Mecklenburg County, embracing current tools and technology are key to meeting the expectations associated with the City's strategic principle of Comprehensive Citizen Service. One change to Current Level (CCL) and one Service Level Change (SLC) were included in the FY13 Strategic Operating Plan request for CharMeck 311.

**CharMeck 311
Organization Structure
July 2012**



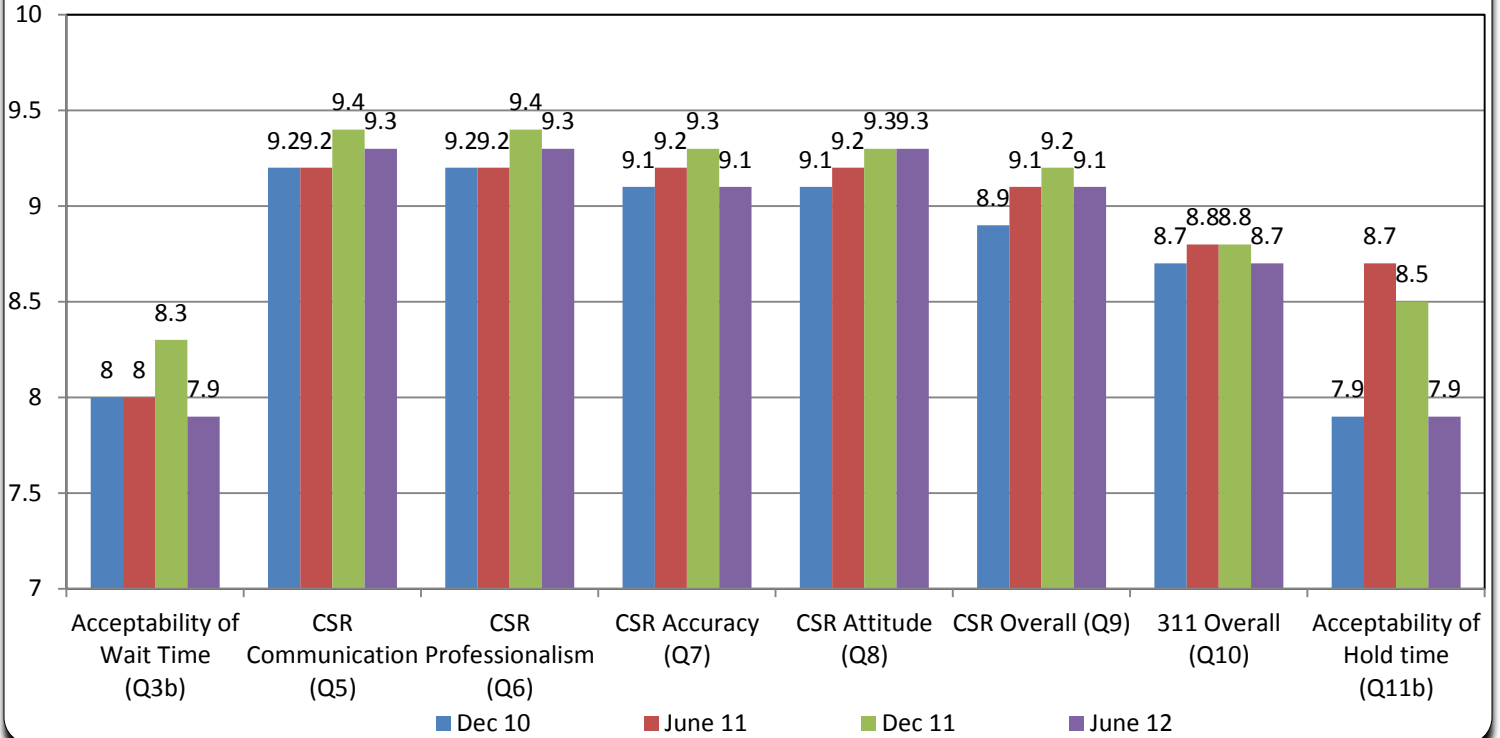
II. Strategy and KBU Planning

CharMeck 311 is the Division of the City Manager’s Office that collaborates with City and County departments to serve as the first point of contact for information on non-emergency government services and service requests.

Accomplishments

Customer Satisfaction and Community Engagement: During FY12 the organization continued to provide “Front Row” customer service by listening to the voice of the customer. The Quality Assurance Team surveyed approximately 100 customers monthly (1,200 for the year). On a 5 point scale CharMeck 311 received an average score of 4.5 and the agents received an average score of 4.6. To provide an independent review an outside company hosted a biannual survey of an additional 900 customers, which resulted in an 8.75 approval rating on a 10 point scale. To evaluate customer interactions over 7,000 calls were monitored. In addition to assessing our citizens’ satisfaction, CharMeck 311 also surveyed the internal business partners including City and County liaisons. On a five point scale, CharMeck 311 received 4.4 on meeting the needs of the specific departments. CharMeck 311’s Speakers Bureau hit the streets with a “Touch the Community” blitz and participated in 48 events. Lastly, CharMeck 311 participated in Mayor’s Youth Employment Program and hosted 10 summer interns beginning in June.

CharMeck 311 External Customer Survey Results for FY11 and FY12



Efficiency: Increased productivity by 12,000 hours for the year. Workforce management and resource utilization is at the mercy of incoming calls and staffing. This involves daily forecasting of call volume and staff calculations to manage service levels. There are many factors that contribute to maximizing productivity but the main components are attendance and availability. In an effort to increase morale, provide training and schedule team building meetings a significant amount of time was depleted for activities other than answering phones and responding to callers. This resulted in lost hours of non-productive time and more importantly lost opportunities to assist customers. To increase productivity without compromising training and morale new techniques were used to achieve this mission, with an emphasis on managing After Call Work status. This resulted in a significant increase in productivity with the net result of improved services despite attrition and no increase in staff. This also resulted in reallocation of resources to provide additional cross-training for current employees. Cost per Call (CPC) is another measure of efficiency. FY12 fully allocated CPC was \$5.39; with Direct Cost at \$4.64. When Self Service contacts are included in the total, Cost per Contact drops to \$4.39 fully allocated and \$3.78 with direct cost.

Training and Workforce Management:

Dual Skilled Customer Service Representatives (CSR): At the end of FY11 the decision to postpone a new hire training class was a blueprint to use resources for cross training existing employees in supplementary skill sets. In the past high call volume and low service levels provided minimal opportunities to provide second skill training in a timely manner. A strategic plan to reduce non-productive time and absenteeism placed CharMeck 311 in a positive position to take CSRs off the phones for dual cross training without impacting performance levels. Today all CSRs are dual trained with the exception of 15 CSRs hired in January.

Triple Skilled CSRs: Completing the dual skill training was a major accomplishment, but getting all CSRs trained in three skills is the ultimate objective. To achieve this colossal goal in FY12 would have required an enormous amount of off the phone time and compromised service levels. Additionally, all employees were trained on new telephony system that launched in June. Challenged with juxtapose training targets, while maintaining a high level of performance required careful planning, teamwork and agility throughout the year. Currently 30 employees can handle three skills with 17 who received training this year. Achieving this third skill set is considered a promotion so this will also assist with retention.

Bilingual CSRs: Currently there are five productive CSRs and one Supervisor who can provide customer service in both English and Spanish. In order to support and provide accessible service to the emerging bilingual customer base CharMeck 311 hired four additional bilingual CSRs in late June. When the bilingual staff is not available translation is provided through the Language Line. The FY12 Language Line budget was \$111,000 with Spanish translation making up for 98% of the requested service.

Technology: Operating a Customer Contact Center has a primary focus of responding to callers and providing information, but another major piece is managing technology. CharMeck 311 has a significant Information Technology (IT) footprint and CSRs cannot perform their jobs effectively without the aid of technological tools. Upgrades, enhancements, maintenance, and reliability are constant areas of concern. This was be a busy year in this area with several upgrades and initiates.

- Virtual Desktop Integration (VDI)
- Verint’s Workforce Management (WFM) Upgrade to Version 10
- Get Abby Interactive Voice Response (IVR)
- Get Abby Delinquent Call Back Program-Utilities
- Telephony Platform Replacement

FY12 Performance Impacts: Service level is a major statistical measure of the consistency and availability of service delivery.

CharMeck 311 Total	FY10	FY11	FY12
Calls received	1,860,001	1,537,601	1,448,908
Calls answered	1,635,384	1,440,186	1,403,760*
Abandonment rate	11.8%	6.0%	3.1%
Average speed of answer	1:27	0:50	0:26
Service Level	60.9%	73.5%	80.7%

* Additionally 318,000 citizens elected self service options, and over 23,000 customers received face-to-face service at CMGC for a grand total of 1,744,760.

Links to Corporate Strategy (See Appendix A)

Run the Business: Enhancing Customer Service will always be a focus for CharMeck 311; it continues to be the Division’s foremost purpose. Focus areas include: improving accuracy, efficiency, quality and professionalism in

service delivery. The focus expands to efforts associated with Comprehensive Citizen Service and the ability to procure and implement a Citizen Relationship Management (CRM) system.

Manage Resources: CharMeck 311 is focused on maximizing productivity, managing costs and ensuring that service levels and other industry standards are met.

Develop Employees: With most staffing needs being addressed, CharMeck 311 devoted time for developing skills and talents necessary to effectively lead and manage in a complex, fast-paced technology driven environment. CharMeck 311 agents received over 23,000 hours of in-house training provided by CharMeck 311 Training Team. This includes new hire training, cross-training and refresher training. In addition to the in-house training, employees received 2200 hours of training provided by City of Charlotte and outside agencies. Several employees took advantage of the City's Educational Reimbursement program.

Strategic Initiatives

- Collaborative and partner with City and County Departments to provide effective service delivery.
- Optimize business processes and manage technology investments.
- Manage resources and provide quality training to maintain high levels of productivity.
- Create a healthy workplace environment that enhances employee job satisfaction & retention.

III. Service Delivery

CharMeck 311 provides non-emergency service and information for the citizens of the City of Charlotte and Mecklenburg County.

Core Service Areas

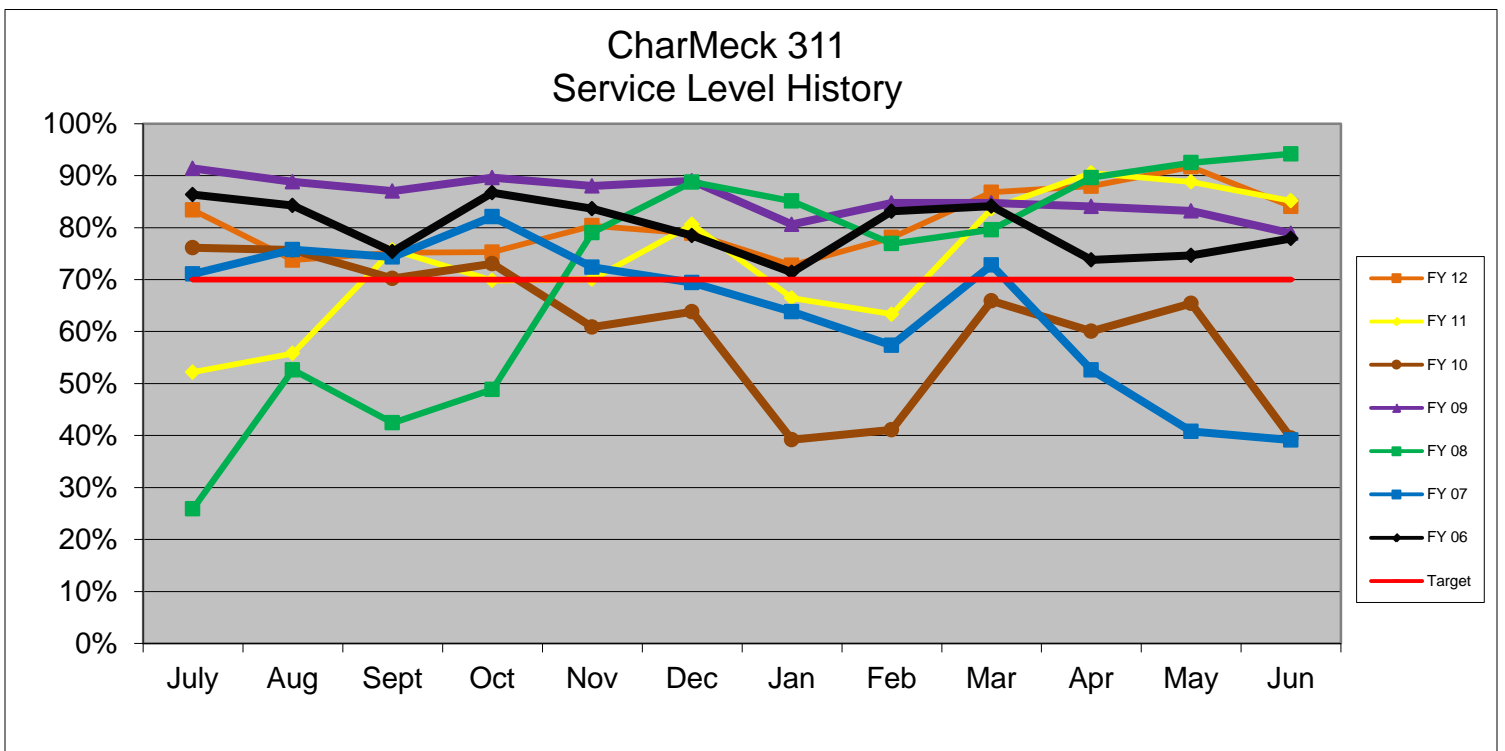
Overall definition of service:

CharMeck 311 processes requests for information, complaints, suggestions, and requests for service for many city and county departments. When citizens request City and County government information, the goal is first call resolution or to direct them to the appropriate service provider. Additionally, callers are provided with information for access to internet/on-line service delivery available at www.charmeck.org and through the new IVR and the mobile applications. CharMeck 311 is the first or alternate point of contact for City and County information, businesses and departments. Departments include:

- Solid Waste Services
- City and County Storm Water
- Charlotte Mecklenburg Police
 - Animal Care & Control Bureau
 - Crime Reporting Unit
 - Non-emergency police services
- Utilities
- Business Support Services-Procurement Services
- Charlotte-Mecklenburg Utilities
 - Water Pressure & Quality
 - Water Distribution and Conservation
 - Wastewater Collection

- Billing Info
- Neighborhood & Business Services
 - Code Enforcement
- DOT
 - Street Maintenance
- Mecklenburg County
 - Parks and Recreation Department
 - Tax Collections & Assessment
 - Land Use & Environmental Services
 - Mecklenburg County Sheriff's Department

FY06- FY12 -Service Level Results



IV. BSC and Performance Measurement

CharMeck 311 utilizes various performance measures to analyze the center's progress towards meeting goals set by the center management in conjunction with the Corporate Scorecard.

Balanced Scorecard objectives are in Clarity.

V. Request for Resources

Base Budget: For CharMeck 311's FY2013 Strategic Operating Plan, a base budget of \$8,595,602 is identified and requested. The total appropriation for FY2013 includes funding for the 20 CMUD positions that transitioned to CharMeck 311 in 2010 and 2011. The Cost Allocation Plan will now handle calculation of expenses related to CMUD services. Cost Allocation Plans provides for reallocation to the enterprise fund. Total appropriation for FY2013 is \$8,670,916.

Change to Current Level: The requested Change to Current Level is \$9,919 due to the increase in lease costs in FY13 per the five year lease at Claude Freeman Drive. CharMeck 311 has identified savings in other line items to cover this additional expense.

Service Level Changes including Technology Requests: CharMeck 311 FY13 budget submittal includes one Service Level Change for consideration.

1. Replacement of Emerald – CRM – total of 5 year project is over \$11,150,000. In addition to TPET request, also included as CIP request.

Revenues: Mecklenburg County provides 26% of CharMeck 311's funding.

VI. Conclusion

Procurement and implementation of a new CRM application continues to be the highest priority for CharMeck 311 in FY13 and is essential for delivering seamless, comprehensive, and top notch service. The current metrics for FY12 are very strong. This momentum is anticipated to continue throughout FY13. The FY12 year-end metrics were reached through strategic planning, diligent volume projections, staff augmentation, increased cross training, process improvements and well-organized workforce management.

VII. Appendices:

Appendix A – CharMeck 311 Link to Corporate Scorecard

Appendix B – Service Level Change Summary

Appendix C – Service Level Changes

Appendix D – Departmental Revenue Summary

Appendix E – KBU Overall Page for Recommended Budget – will be provided in the consolidated City Manager's Office SOP.

Appendix A – CharMeck 311 Link to Corporate Scorecard



APPENDIX B – CharMeck 311 Change to Current Level & Service Level Change Summary

<u>FY12 CCL & SLC List in Priority Order</u>	<u>Cost Center</u>	<u>FY13</u>
1. CCL-Operating Expense-Increase in Building Lease	10700	\$ 9,919
2. SLC-Emerald Replacement (CRM)	10700	\$ 11,150,000 (over 5 yrs)

APPENDIX C – Service Level Changes – Service Level Pages are in Clarity Budget System.

APPENDIX D – CharMeck 311 Revenue Summary

<u>Division</u>	<u>Cost Center</u>	<u>Revenue</u>	<u>Source</u>	<u>FY13</u>
CharMeck 311	10700	26% of Budget/Techn.	Meck County	\$2,136,031*
CharMeck 311	10700	Departmental Charges	BSS-Space lease	\$ 11,015

*-Mecklenburg County's 26% may change based on CRM funding. \$2,136,031 is based on CAP # in Clarity.

Note: CMU-15 FTEs from 1/1/10 originally planned to be added to CAP with FY12, Per Budget will be added in FY13. CMU-5 FTEs from 1/1/11 originally planned to be added to CAP with FY13

APPENDIX E – Overall Page for Recommended Budget

Will be provided in the consolidated City Manager's Office SOP.

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CharMeck 311
City Manager's Office
FY13 Final SOP