City Council Bill 21-0010R – Informational Hearing Getting on the Same Page: Clarifying 311 Services' Approach to Resolving Requests
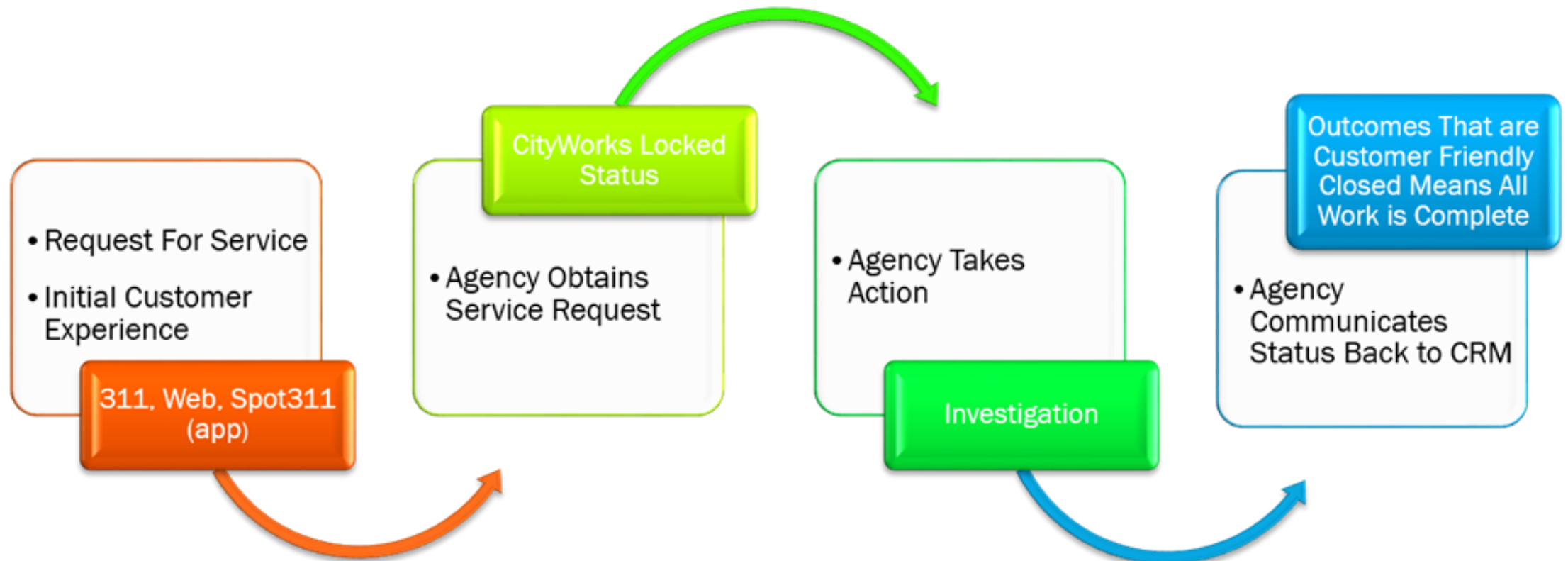
311 and Salesforce (CRM)

- First city in the U.S. to implement 311 as a police non-emergency number in 1996.

- Second city in the U.S. to expand 311 to all city services in 2000.

- 311- receives almost 1,000,000 contacts annually. No other city agency or system has more interactions with our citizens, businesses and visitors.

- The previous 311 CRM technology was in place for nearly 15 years. It was under-performing, unsustainable and lacked future vision.

- 311 had been investigating and planning for a technology upgrade and successfully completed a competitive solicitation for an innovative, best-in-class CRM solution.

- Salesforce Service Cloud emerged as the recommended supplier.

- 311 successfully completed a 21-month project to transform and migrate from the legacy system to Salesforce. This project included a detailed configuration project and comprehensive citywide training initiative

The Workflow Process

- Request For Service
- Initial Customer Experience

311, Web, Spot311 (app)

CityWorks Locked Status

- Agency Obtains Service Request

- Agency Takes Action

Investigation

Outcomes That are Customer Friendly Closed Means All Work is Complete

- Agency Communicates Status Back to CRM

311 Metrics FY 2021

Measures	Target	July Actual	Aug Actual	Sept Actual	Oct Actual	Nov Actual	Dec Actual	Jan Actual
# of calls received in 311		62,891	64,547	41,904	40,183	39,707	38,348	43,303
# of service requests submitted via Mobile App		7,163	9,778	6,274	5,484	4,748	4,669	5,836
# of service requests submitted via Web		3,594	4,409	3,239	2,738	2,178	2,245	2,639
Number of calls received vs number of calls answered (abandon rate)	<5%	3%	2.4%	1.0%	1.0%	1.5%	1.0%	1.3%
% of calls answered within 60 seconds in 311	90%	96%	94%	98%	98%	96%	97.0%	96%
Average time to answer a call in 311 (in seconds)	30	10	12	7	6	9	8	10
Average QA score for Call Takers - vs. standard of %100	100%	98%	99%	99%	99%	98%	99.0%	98%

How many service requests are satisfactorily resolved and how many instead go unanswered or are "closed" by the system but then require follow-up requests by residents who aren't satisfied by the initial response?

- It is the agency's responsibility to conduct any follow up necessary directly with the customer.

- Escalation Service Request: the responsible agency is to follow up with the resident within 24 hours if the request meets any of the following criteria:
  - Closed but the customer indicates that the work is not done
  - No comments or information were entered in the request when it was closed that answer the customer's follow up question

When service requests are referred to other City agencies, are customers connected to the proper people at those agencies to follow-up on their requests?

- 311 Call → Salesforce Service Request → Transfer to proper agency
- After the transfer, it is the responsibility of the agency to:
  1. Complete the request
  2. Ensure that the status of the request and any pertinent info is entered into Salesforce (directly or through CHIP, Cityworks, or BGE)

Does 311 make repeated efforts, if necessary, to determine whether agencies have fulfilled service requests?

- Once the service request is entered into Salesforce, the request is dispatched to the correct agency.

At this point, it becomes the agency's responsibility to perform the work or to conduct any follow up necessary, which may include contacting the customer directly.

If 311 directs a service request to the wrong agency, does it have a system in place so that similar service requests will be reported to the correct agency in the future?

- 311 works with agencies to develop and update service request types that coincide with the services offered by the agency.
- If the service request is entered in an incorrect queue, the receiving agency will transfer it to the correct agency. Salesforce will notify the customer by way of email.
- If a caller requests a service that does not align with any existing service request type, the 311 agent will create an ECC Supervisor Follow Up request.
  - If the service is not provided by the City, the 311 Supervisor will contact the customer and provide them with an alternative, if one is identified.
  - If the agency determines that the service requested should be added to their list of responsible requests, 311 works with the agency to develop the request and the scripts and configure the type in the system.