SUBJECT: Customer Service - Telephones (City Wide) (FCS06018) Referred from Corporate Administration Committee on September 21, 2005

RECOMMENDATION:

a) That Report FCS06018 be received.

b) That the issue of follow up Customer Service – Telephones on Outstanding Business of the Corporate Administration Committee be identified as completed and removed from the Outstanding Business List.

Joseph L. Rinaldo
General Manager
Finance and Corporate Services

EXECUTIVE SUMMARY:

On September 21, 2005, the Corporate Administration Committee requested that staff continue to investigate various options to address concerns with the use of voice mail, and to report back to the Committee on costs and process/implementation, following consultation with the Corporate Management Team.
On February 16, 2005, the Corporate Administration Committee requested that staff report back on the implementation of a corporate policy which would require that telephones in all City Departments have the capability of defaulting to a live person, as opposed to voice mail, should the caller wish to leave a message. The concern noted was that both internal and external callers are often greeted with voice mail, and there was a suggestion that there should be an alternative available in the form of a live answer. Following a review of the resources and possible staffing implications of the zero out option, Report FCS05100 was presented to the Corporate Administration Committee on September 21, 2005 to address this concern. It was determined that additional education to staff and the best efforts of departments to address the concerns would be undertaken.

At the September 21, 2005 Corporate Administration Committee meeting, the report was received. Members of the Committee expressed concern with respect to the zero-out option, and requested staff to continue to investigate various options and report back to the Committee on costs and process/implementation, following consultation with the Corporate Management Team.

**ANALYSIS/RATIONALE:**

The technology of the telephony system has been further reviewed to determine a number of options available for use in different circumstances in order to address the concerns raised by members of committee. Several options which are or can be made available are noted below. In addition, the use of good telephone etiquette, establishment of telephone and voicemail protocols, and education to staff will improve customer service.

In order to address the issues of customer service expressed, staff will undertake a program of assisting departments to improve their telephone customer service through identification of problem areas, providing information about available alternatives, educating staff on appropriate telephone and voice mail protocols, assisting departments to implement changes in order to ensure an improvement in response by telephone.

**ALTERNATIVES FOR CONSIDERATION:**

The telephony system can help to improve customer service, through a more effective use of the system’s capabilities. Some of the suggestions would require configuration changes to be implemented by Information Technology staff.

1. Voice mail greetings
   - should be updated daily with correct information
   - should include customer options (i.e. who-to-call information, zero out, where available, etc.)
   - could include other contact methods (e.g. email address)
   - should provide an expectation of when the caller can expect a response
   - should have a tone that is sympathetic to the caller
Call forwarding – when out of the office, each line may be forwarded to a cell phone or another staff phone. Staff can undertake this forwarding from their own phones, checking to ensure it is properly forwarded, and if the line is forwarded to another staff phone, checking to make sure that the other person will be available to take calls.

2. Call pick-up groups – Information Technology staff can create a call pickup group for an area. This permits staff to answer any phone that may be ringing in their area without having all extensions programmed on their own phone.

3. Call forward busy / no-answer – Information Technology staff can create hunt groups within an area. In the event of an extension being busy or not answering after 3 rings, the caller can be automatically forwarded to the next number in the sequence. The hunt group may comprise several extensions.

4. Common extension number – Information Technology staff can add a common extension number to all phones in an area. This number could be set up as the zero-out number or as a call forward busy number. Not all phones have this capability.

Options 2 through 4 would require IT staff time for planning, configuration and ongoing support. The full impact would be dependent on changes implemented.

5. Zero-out - Information Technology staff can program forwarding to occur if the caller presses zero or another digit while listening to the greeting. Zero-outs can be programmed to forward to an individual number or a queue. Greetings should be clear on when the zero-out will be available if the hours of operation are limited.

The zero out option would require significant additional resources in all departments, as work processes would need to be redefined, and additional staff resources added in order to ensure the continual coverage required by this option. In addition, it is important to note that the zero-out option would also require a significant effort to implement, for IT staff, requiring substantial time (4-6 weeks) for implementation, and additional staff resources to maintain ongoing changes to the zero out capabilities (approximately $40,000 annually).

**FINANCIAL/STAFFING/LEGAL IMPLICATIONS:**

As noted above, it is anticipated that there would be significant staffing, and corresponding financial implications if we were to implement a corporate zero out process.

The recommended alternate of best efforts commitment and education to staff will not require financial resources. However, Customer Service and IT staff will be required to consult and assist departments with selecting and implementing the most effective option. Training may also be required to ensure staff are familiar with the changes applied to the phone service. Consultation would require an estimated 4-6 weeks of dedicated staff time. This is in addition to time required to implement and support the
changes. The recommended approach will take place over an 18 month period, with noted areas of concern being addressed early in the process.

**POLICIES AFFECTING PROPOSAL:**

N/A

**RELEVANT CONSULTATION:**

Technical and costing information was provided by the IT Division of the Corporate Services Department. Discussions were also held with the Corporate Management Team concerning the approach.

**CITY STRATEGIC COMMITMENT:**

By evaluating the “Triple Bottom Line”, (community, environment, economic implications) we can make choices that create value across all three bottom lines, moving us closer to our vision for a sustainable community, and Provincial interests.

**Community Well-Being is enhanced.** ☑ Yes ☐ No
Public services and programs are delivered in an equitable manner, coordinated, efficient, effective & easily accessible to all citizens. Participation in community life is accessible to all Hamiltonians.

The improvement of responsiveness to the public ensures accessibility of the public to City services and community participation, addressing community needs and supporting the community’s quality of life.

**Environmental Well-Being is enhanced.** ☐ Yes ☑ No
There will be no environmental impact as a result of this initiative.

**Economic Well-Being is enhanced.** ☐ Yes ☑ No
There will be no economic impact as a result of this initiative.

**Does the option you are recommending create value across all three bottom lines?**

☐ Yes ☑ No
This initiative creates value for community well-being.

**Do the options you are recommending make Hamilton a City of choice for high performance public servants?**

☑ Yes ☐ No
A respectful, desirable, supportive workplace is enhanced through providing tools and supports for employees to assist them in their jobs.
Telephone and Voice Mail Protocols

Good use of telephone etiquette, as well as maximizing the use of the options that the telephony system offers will provide a higher level of customer service. Prompt return of voice mail messages within a reasonable amount of time is also important. Taking ownership of the calls we receive, and assisting callers to find the correct contact also provides for good service.

1. We will answer the phone - in person, or offer alternatives including voicemail - within 4 rings

2. When answering the phone, we will use the following etiquette:
   - Begin each call with a welcoming greeting
   - Identify ourselves
   - Establish and meet your needs

   If we must put you on hold we will;
   - ask permission
   - explain why you are being put on hold
   - provide an estimate of the length of time you can expect to be on hold
   - thank you for holding, both before and after
   - end the call with a thank you or other positive comment

   When transferring your call we will:
   - Ask for your consent
   - Transfer only once; we will find the correct person for you before transferring
   - Transfer to a line that is attended and provide the person we are transferring to with an explanation of your situation
   - Confirm with you that you are being transferred and introduce you to the person who is going to help you, providing their name and number
   - When we are not sure where to transfer the call, we will take your name and number, and call you back with the correct information
   - If the person is not available, ask you if voicemail is acceptable.

3. When we are not available

   Alternative technology will be used, where appropriate and available, to ensure as many callers receive a response, including use of hunt groups, call pick-up groups, common extensions, or call forward to cell phones or other attendants
Use of Call Forward, hunt groups, call pick-up groups, common extensions

- When we are out of the office or unavailable, we will utilize hunt groups, call pick up groups or common extensions to ensure that calls are answered
- Where these options are not feasible, our phones will be forwarded to a person or to voicemail
- We will make sure the line to which we forward is attended

Returning Messages

- All messages will be returned within one business day, whether they are taken by a person or received by voicemail, with the exception of extended absences

4. Use of Voice Mail

The voicemail message you hear should include:

- A thank you for calling
- The date
- The name of the person
- The name of the department
- A timeframe for when the message will be returned
- An alternate contact - name and number - or a "zero out" option to an attended line
- For extended absences (holidays), the message should clearly state that the person is away and when they will return

Messages are to be checked regularly, and returned within one business day (except for extended absences).

5. Service in languages other than English

- If services are required in a language other than English, employees will access the Language Line to assist the callers.