

CITY OF PORTLAND Telephone Customer Service Practices & Guidelines

December 1998

Office of the City Auditor
Portland, Oregon

*Winner of the 1998 Knighton Award
for Best Audit
Given by the National Association
of Local Government Auditors*

AUTOMATED MENUS

RESPONSIVENESS

VOICE MESSAGING

ANSWERING THE TELEPHONE



CITY OF
PORTLAND, OREGON

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December 28, 1998

TO: Mayor Vera Katz
Commissioner Charlie Hales
Commissioner Gretchen Kafoury
Commissioner Erik Sten
Commissioner Jim Francesconi

RE: Telephone Customer Service Audit

Attached is Audit Report #245 on the City of Portland's telephone customer service. The audit was conducted in accordance with our FY 1997-98 audit schedule.

While we found some areas needing improvement throughout the City, in general we determined that City employees do a good job communicating with citizens on the telephone. We hope the City and its employees will use this report to further improve their telephone skills and practices.

We appreciate the cooperation we received from the Office of Neighborhood Involvement, the Bureau of General Services' Telecommunications Division, and others with whom we worked in conducting this audit.

Barbara Clark, CPA
Portland City Auditor

Audit Team: Richard Tracy, Janis Hull, and Kate Ernst

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A Report by the Audit Services Division
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Audit Objectives, Scope, and Methodology

The objective of our audit was to evaluate the quality of customer service that citizens receive when they telephone the City of Portland. We assessed the quality of City employee telephone skills, such as responsiveness, attitude, knowledge, and professionalism. In addition, we evaluated the performance of voice messaging and automated menu systems.

To test an even distribution of numbers from the City, we used a variety of methods to select telephone numbers. We made over 200 calls in total to 19 City bureaus and offices.

To evaluate the quality of the City’s telephone customer service, we compared City performance to industry standards and best practices. We were able to find an extensive amount of literature on quality telephone customer service. The inside back cover of our report lists the sources we found most useful.

We did not evaluate the City’s methods and procedures for resolving public complaints about City actions and services. Due to the fact that the complaint resolution system is largely decentralized, this area warrants additional audit or analysis to determine if more efficient and effective methods are available.

Background

The City has made a commitment to restore the public’s trust and confidence in government by providing quality services that are effective, efficient, and accountable. In part, this will be achieved by facilitating communication between the City and the public, ensuring citizen participation, providing accurate and timely information to the public, and promoting more responsive City services.

The City’s Information and Referral (I&R) program within the Office of Neighborhood Involvement provides Portland’s citizens with centralized information and referral services. The goal of I&R is to meet the caller’s needs on the first referral. The program’s mission is to increase and streamline citizen access to all City services, as well as to other services available in the metropolitan area. The I&R line received over 72,000 calls in FY 1997-98.

This report provides our assessment of the quality of City telephone skills and offers best practice guidelines to improve bureau performance. Each section of our report summarizes our audit results on the left-hand side of the page and provides the corresponding guidelines on the right-hand side.

The audit was included in the City Auditor’s FY 1997-98 audit schedule. We conducted the audit in accordance with generally accepted government auditing standards and our review was limited to those areas specified in the objectives, scope, and methodology section of the report.

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Overall, People Who Answer City Telephones Do A Good Job

How a citizen is treated on the telephone can leave the caller with a lasting impression. To assess how well callers are treated, we evaluated call takers on how well they answered the telephone, their knowledge of basic City and bureau operations, and their telephone presentation and communication skills.

Good indicators of quality customer service:

- Ninety-nine percent of call takers answered calls by stating their name and/or organization.
- Call takers were consistently rated above average in clarity of speech, volume of voice, tone, amount of feedback, and overall impression.

Areas lacking best customer service practices:

- Approximately three out of four calls were answered without a salutation or solicitation for information. A much better first impression was made when call takers answered by giving their name and/or organization in addition to a salutation and asking how they could be of assistance.
- One-quarter of call takers were unable to answer a basic question about the City or their bureau. This indicator varied substantially throughout the City. For example, one bureau answered questions accurately only 39 percent of the time, while another bureau was accurate 93 percent of the time.
- Using interns and new employees to answer telephones results in incorrect transfers and referrals.

We experienced that the professionalism and helpfulness of the employee answering the call had an even greater impact on our impression of the City than the accuracy of the answers.

GUIDELINES

Answering the Telephone

- give salutation (e.g., “good morning”)
- state name and/or name of organization
- solicit information
- thank people for calling

Call Taker Skills

- able to answer basic questions about organization
- speak at appropriate volume--loud enough to be heard, but not forced
- speak clearly--have appropriate rate of speech & good pronunciation
- speak in a tone that is pleasant, businesslike, & uses positive language
- interact with caller in a manner that demonstrates interest, understanding, & willingness to help

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Voicemail is a Potential Source of Frustration for Citizens

City employees frequently hear that citizens are frustrated when they call the City and reach a voice messaging machine. Of all our calls to the City, almost one in five reached a voicemail greeting. To evaluate the quality of the voicemail messaging, we assessed the usefulness of the greeting and the length of the message.

Useful voicemail practices:

- Ninety percent of voicemail boxes provided the name of the person and/or the organization.

Voicemail areas needing improvement:

- Only a small number of voicemail greetings (8%) gave the dates for which the message was valid.
- Only thirteen percent of voicemail boxes gave the name and telephone number of a colleague who could provide some assistance to the caller.

Although reaching voicemail can be frustrating for a citizen, we found that some voicemail messages were more effective than others. For example, one message gave the name of the voicemail recipient, bureau name, dates for which the message was valid, and when calls would be returned. This message provided assurance to the caller that they had reached the correct number and that the message would be heard in a predictable time frame.

GUIDELINES

Voicemail Greeting

- name of the person to which the voicemail belongs and/or name of organization
- dates for which the greeting is valid
- what key(s) caller can press on the telephone for immediate assistance
- when caller can expect a return call (should be more specific than “as soon as possible”)
- name & extension of a colleague who can provide assistance

Voicemail Message

- updated regularly (at least weekly)
- as short and to the point as possible
- have enough capacity to store all the messages employees might receive

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Accessing City Information Can Be Time Consuming

A major goal of the City is to be responsive to citizens. Being responsive includes providing timely and easily accessible information. We have defined responsiveness in telephone customer service as answering the telephone quickly, providing “live” assistance when necessary, limiting use of the hold function, and transferring calls appropriately.

Good indicators of responsiveness:

- The City answers calls in a timely manner. Calls were, on average, answered within three rings.
- When placed on hold, waiting time was less than three minutes 84 percent of the time.

Areas of potential citizen frustration:

- More than one in four calls were picked up by an automated system. While automated systems can be effective, City employees told us that overuse has been a source of frustration to citizens.
- When a live person was reached, 23 percent of those calls were placed on hold. According to our interviews, overuse of the hold function is also frustrating to citizens.
- Twenty-five percent of the calls placed on hold left the line open, causing background noise and conversations to be heard.
- Thirteen percent of the calls were transferred without prior notification. Although this is a small percent, the experience left a strong negative impression.
- One-third of the calls were transferred without providing the number to which they were being transferred. This practice leaves the caller without enough information to call back on their own if necessary.

One way City employees can reduce the multiple transferring of callers, and possibly reduce hold time while looking up information, is to use the City’s Information and Referral (I&R) line at 823-4000. I&R has developed a database that allows their attendants to quickly identify the best assistance for callers.

GUIDELINES

Customer Responsiveness

- answer telephone by third ring
- do not use hold more than 3 minutes
- use the hold button, rather than leaving the line open
- if you need to complete a task for the caller that will only take a minute, give the caller the choice of holding or receiving a call back

Transferring Calls

- let the caller know that you are going to transfer the call
- give the caller the name and phone number of the person you are transferring him or her to
- preview the transfer process for the caller
- thank the caller for allowing you to transfer the call
- if possible, stay on the line while connecting to verify you are sending the caller to the correct person or that the receiver is available to take a call

Automated Menus Can Be Confusing to Citizens if Not Properly Implemented

Automated telephone menus can be time saving for City employees, but also confusing for citizens trying to navigate through them. We reached 49 automated menus and evaluated them on the number of menu options available, the presentation of the options, and the ease of moving within the menus.

Effective uses of automated menus:

- Multiple options on an automated menu can cause confusion. Eighty-four percent of the menus we reached had five or fewer options. Of those with more than five options, two included a listing of staff to help the caller find the person they wanted to reach.
- To help callers navigate through an automated menu, the option should be given first, followed by the key to press. For example, “For more information about X, press 1.” During our testing, we found only one menu that gave the key to press followed by the option--reversing the recommended order.

Automated menu applications that may cause confusion:

- Only 37 percent of the menus provided an option to repeat the menu. Without that prompt, callers have to call back if they missed an option.
- Only 24 percent of the menus gave the option to exit the menu and speak with a “live” person.
- When we attempted to reach a “live” person by pressing 0 or staying on the line, we reached an attendant only 40 percent of the time. The other 60 percent of the time we frequently got a message that no attendant was available.
- Of the 49 menus we reached, only five gave the dates for which the message was valid.
- Of the five menus with time specific information, none contained current information.

While automated menus can be a useful tool for the City and its citizens, they can be ineffective and frustrating if used improperly. The bureaus that use automated menus need to be attentive to the efficiency and accuracy of their menus.

GUIDELINES

Automated Menus

- limit the number of choices offered in a single menu to five or fewer
- tell callers how they can easily reach someone “live” if they need assistance
- give callers an option first, followed by instructions on what key to press to take action (e.g., “for information about x, press 3”)
- let callers know what keys to press to repeat menus or replay information
- make it familiar--have your script mirror normal person-to-person communication as much as possible
- position the most commonly requested choices first on the menu
- allow callers to repeat, pause, and move forward & backward through scripts and menus, keeping key presses consistent

RECOMMENDATIONS

Citywide

1. The Division of Telecommunications within the Bureau of General Services, in cooperation with a committee of bureau representatives, should develop policies and procedures for telephone customer service. These procedures should be general enough to apply to a variety of City operations. The guidelines we present in this report can be used as a model for the citywide procedures.
2. Information and Referral staff within the Office of Neighborhood Involvement should distribute information to City bureaus on I&R's roles, responsibilities, and services more frequently. During the audit we found significant differences in the level of knowledge employees had about I&R.

Bureaus

1. Develop guidelines to assist bureau employees in answering the telephone, setting up voicemail box greetings, and the use of hold and transferring functions.
2. Provide information to employees about the services provided by the City's I&R. Encourage employees to use I&R's services.
3. Regularly review and update automated menus. Verify that the menus are current, user-friendly, and provide useful assistance.
4. When possible, have a "live" person assist callers.

SOURCES FOR GUIDELINES & BEST TELEPHONE CUSTOMER SERVICE PRACTICES

- Anderson, K. 1992. *Great Customer Service on the Telephone*. New York: AMACOM: American Management Association.
This book offers specific tips and techniques to improve a person's telephone effectiveness.
- ASPCA National Shelter Outreach. 1998. *Positive Customer Relations: Basic Telephone Skills* [WWW document]. <http://www.aspca.org/educate/outtel.htm>
A list of the most frequent complaints from people about customer relations and service over the telephone and gives a few tips on how to be effective on the telephone.
- Change Dynamics. *Telephone Skills* [WWW document]. <http://www.changedynamics.com/samples/telephon.htm>
This document includes sections that address nonverbal communication on the phone, interpreting vocal messages, understanding effective listening, and a telephone skills analysis worksheet.
- Cook, E.M. 1997. *Using the Telephone Effectively* [WWW document]. http://www.bizproweb.com/pages/features/telephone_skills.html
Gives ten tips to communicate confidence and competence over the telephone.
- Farrell, T.J. 1990. *Effective Telephone Skills*. Fort Worth: Harcourt Brace Jovanovich College Publishers.
This book stresses the key role the telephone plays in modern business careers and is organized into two major sections--fundamentals of telephone communication and sharpening your telephone skills.
- Multi Messaging Educational Committee. [pamphlets and WWW documents]. <http://www.mmec.org/mmec>
The MMEC is an excellent resource for a variety of telecommunication topics, including telephone, fax, and voicemail.
- Online Women's Business Center. 1998. *Let Them Hear You Smile: Telephone Skills* [WWW document]. http://www.onlinewbc.org/Docs/market/mk_appear_phone.html
Gives tips to help consumers use their telephone to the fullest potential.
- Stephens, S.G. 1992. "Voice Mail 101: Voice Messaging Educational Committee Bands to Educate End-users on the Realities of Voice Mail." *Voice Processing Magazine* October: 18-22.
This article covers monitoring your system, when it is appropriate to install a voice mail system, ten tips for effective voice mail, and when not to use voice mail.
- Timm, P.R. 1997. *Winning Telephone Tips: 30 Fast and Profitable Tips for Making the Best Use of Your Phone*. Franklin Lakes, New Jersey: Career Press.
This book discusses a variety of telephone tips including telephone courtesy, effective communication, and voicemail.
- Voice Trak. 1998. [WWW documents]. <http://www.voicetrakvm.com/vmetig.htm>
A good source of information on how automated telephone systems work and tips for automated attendant phone systems and voicemail