

DRAFT: 6-9-2023

The City of
SAN DIEGO

DIGITAL CUSTOMER EXPERIENCE (DCX) STRATEGY



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Message from the Performance & Analytics Department

Honorable Mayor and City Councilmembers:

Digital services are about people. By taking a human-centered approach as we implement technology, we can make our customers' and employees' lives easier.

Get It Done launched in 2016 and sparked enthusiasm for what's possible. Over the past seven years we've expanded and grown Get It Done, and it's time to move to the next level. This document – currently in draft form – lays the groundwork for what it will take to improve the customer experience for everyone.

Thank you to the many department directors, executive team members, communications staff and industry experts who helped shape this preliminary draft.

As we continue to develop this vision, we will seek feedback from City leadership and community members to plan a future where people are empowered and engaged by digital services.

With gratitude,



Kirby Brady & Alex Hempton

Chief Innovation Officer and Director & Deputy Director, Performance & Analytics Department

 Performance
& Analytics

Executive Summary

“Every day we serve our communities to make San Diego not just a fine city, but a great City.”

This mission statement builds on San Diego’s reputation as America’s Finest City. The optimal outcome of service delivery is to achieve a level of service that continuously exceeds customer expectations. Interacting with the City of San Diego should not just be *fine*; it should be accessible, reliable and gratifying. This document, the City’s first *Digital Customer Experience (DCX) Strategy*, sets the vision for how a digital services framework empowers the organization to reimagine how services are delivered across all channels to meet people’s needs. The goal is to design services that focus on people. This approach is essential to ensure the technology and processes behind a service consistently meets the needs of all San Diegans.

The City has fragmented technology and processes that have created inconsistent customer and employee experiences across services and channels. To address this service gap, an investment in a robust digital services foundation is needed to support City employees in serving all customers – whether they reach out through self-service channels or speak to City employees in person. This investment in digital services must occur before launching a call center to best position 311 for success. If a call center was launched without first investing in digital services, employees assisting customers would not have the resources and support to serve customers effectively. In addition, people who prefer *not* to call would be *forced to call*, inevitably contributing to longer wait times, a more negative overall experience for customers and employees and a larger bill for the City. Likewise, customers that *can only* call have trouble accessing phone-based service due to long wait times. Therefore, the City must prioritize and improve digital services to realize a future where all City services are easily accessible, have reliable outcomes and deliver a consistently gratifying customer experience.

Currently, across all departments, improvements to the digital customer experience are needed to meet customer expectations. Significant investment is required to exceed those expectations. Making improvements to digital services is not just a nice amenity - it is a critical component of customer service delivery infrastructure.

To overcome current customer service shortcomings, the City must resolve existing technology and process deficiencies and adopt a dedicated, people-centric DCX strategy. Designing simple, easy and innovative solutions takes intentional focus and dedicated time, attention and resources. There is demand and desire from customers to engage with the City easily, and – similarly - employees need the same intuitive technology and processes to serve customers effectively.

This document, the Digital CX Strategy, lays the foundation for actions, methods and plans needed to usher in a future state envisioned by the City's Strategic Plan. **This strategy identifies gaps in how the City currently serves people, suggests tangible ways to implement the City's Operating Principles and provides long-term recommendations.** This helps achieve the City's overall Mission & Vision outlined in the Strategic Plan.

The DCX Strategy is organized into explicit sections. Core Values & Guiding Principles are meant to be "evergreen" – if revisited in 15 years, they will remain relevant. The Recommendations & Resources sections identify near-term actions to help implement the strategy.

- ⇒ **Core Values** establish universal themes in a digital strategy.
- ⇒ **Guiding Principles** explain the "code" by which digital CX strategy will live.
- ⇒ **Recommendations** outline specific actions to begin adopting principles.
- ⇒ **Resources** identify roles and requirements to implement *Recommendations*, apply *Principles*, and realize *Core Values*.

The City should envision a future where people are at the center of every effort. The path to making this possible requires investment in the development of user-focused digital services and in the people with skills in this domain.

The City has made *initial* investments in digital technology which have sparked excitement and a desire for more. However, to perpetuate growth aligned with the City's vision and people's expectations, we must dedicate substantial and sustained investment to execute a digital customer experience strategy.



Section 1: Core Values

Accessible

Making digital services **accessible** is the first step towards engaging with all people in San Diego. For this DCX Strategy, accessible means:

- ⇒ **Services are easy to locate, no matter who you are, your basic knowledge of City services or how departments are organized.**
- ⇒ **Information is available in clear, plain language.**
- ⇒ **Information is available in many languages.**
- ⇒ **Services are available through communication channels people prefer to use.**

All digital services should be approachable, inviting, clear, intuitive and without barriers to entry. Accessibility is a fundamental element for any successful CX strategy.

Digital services should be simple and easy to use, evoking the feeling of ease and free from frustration.

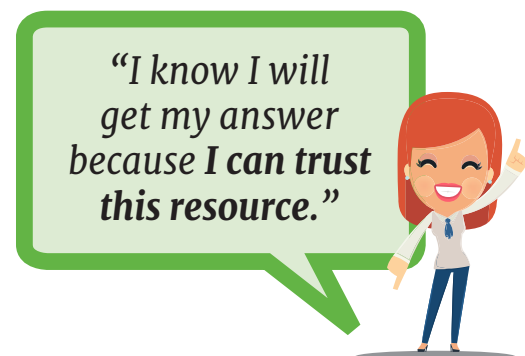


Reliable

Designing **reliable** digital services requires a seamless experience across all City channels, functions and departments. People want digital services that just work; services without dead-ends, insufficient answers or inadequate solutions. Reliable digital services consistently achieve the intended result.

Universal consistency is key for building trust in the customer experience. Whether someone is connecting with the City through a mobile app, in person or on a phone call, the same high level of service is expected.

This value necessitates that all information the City provides is accurate and valid. With a reliable customer experience, people will feel confident that the information they receive is trustworthy.



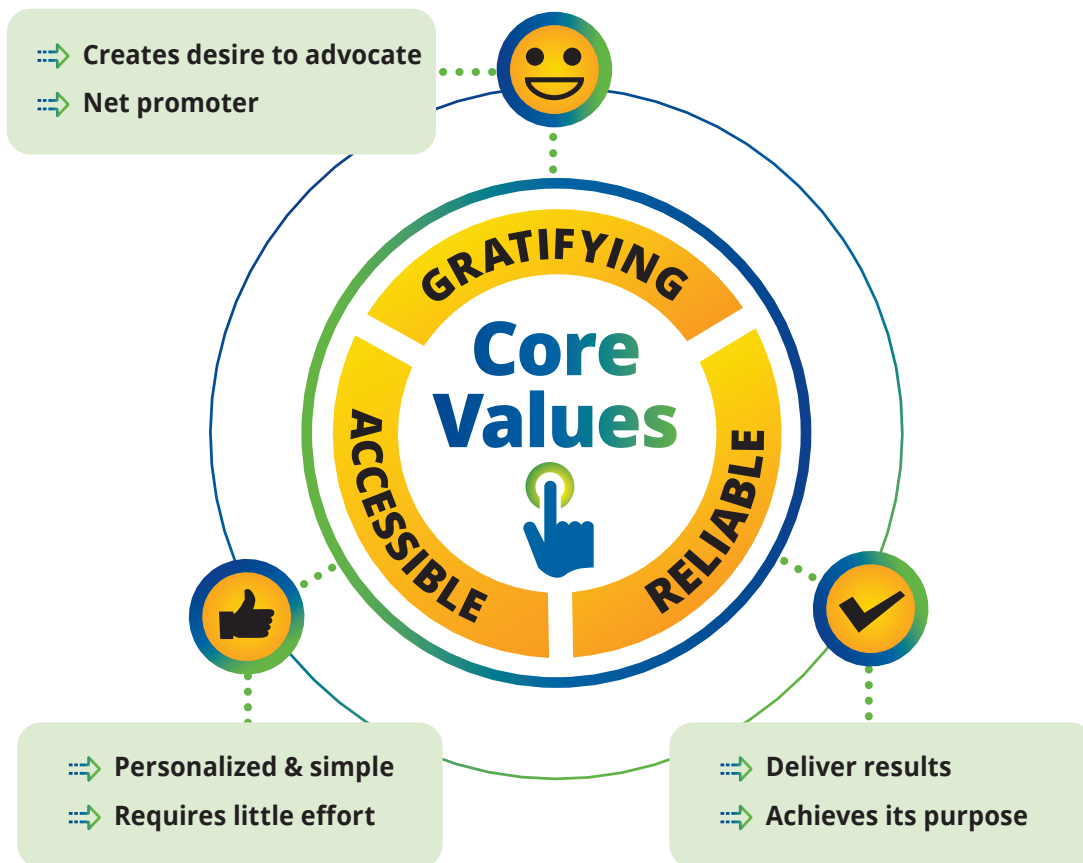
Gratifying

The customer experience at the City of San Diego should be **gratifying** across all service types. This involves exemplary service standards with clear answers, transparent information, communicated results and easy-to-use channels.

When people complete an interaction with the City, they should have a feeling of satisfaction and be content with the experience. In addition, the person should feel satisfied enough that they are willing to share their positive experience within their community and serve as an advocate for the service. Employees are also gratified by technology that works and empowers them to do their job in a meaningful way.



“Yay! I got what I came here for, and I felt good about that whole experience.”



Section 2:

Guiding Principles



For this DCX Strategy to thrive and flourish, all work should adhere to an established set of guiding principles – the City’s *CX code*. Using these ideals as a standard for digital services will help ensure that people’s needs are continuously prioritized.

The three guiding principles are:

- 1. Human-Centric Design:** Adopt industry-standard approaches to customer-facing digital service design.
- 2. Holistic Digital Innovation:** Develop digital solutions that optimize the capabilities of customers and employees to support empowerment every step of the way.
- 3. Harmonized Service Delivery:** Create a seamless customer experience with synchronized internal processes that consistently achieve desired results.

PRINCIPLE #1: Human-Centric Design

What is it?

Human-centric design is an industry-standard approach to customer experience that prioritizes people’s needs at all points in a service’s design and delivery. By actively incorporating people’s needs and input at various points in the design process, the City is better equipped to build a process that people are more likely to engage with and enjoy.

Historically, the City has not consistently elevated the needs of end-users at the same level as other requirements (business, technical, security, etc.), making it challenging for customers and employees.

Why does the City need it? What are the benefits?

To ensure resources are spent efficiently, the City must appropriately incorporate people’s needs into the development of new and redesigned tools and processes. This allows the City to address people’s most critical needs better while encouraging a positive CX. Furthermore, **creating a simple, intuitive experience results in fewer customer service escalations, more trust and transparency in the process and less overall time and money spent recovering from poor customer experiences.**

For the City to adopt a human-centric design approach, investing in user research is required. The goal of user research is to better understand the user's experience and perspective when interacting with an organization or service. Some examples of user research tools include focus groups, user interviews, surveys analysis and feedback on user interface (UI) prototypes.

Human-Centered Design in practice:

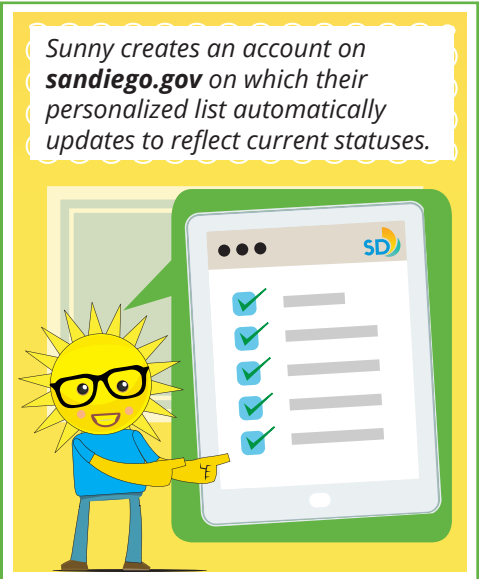
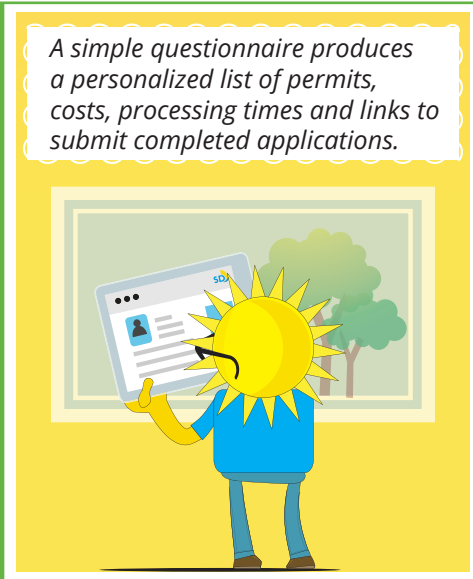
Focus groups and user testing were utilized in the development of Get It Done. Anonymous users visited the Get It Done website before launch and captured their experience by recording their screen navigation while providing audio narration. This research led to subtle – but important – changes and adjustments incorporated before launch. Get It Done continues to be a work in progress that is constantly improved through customer feedback to reflect the evolving needs of users.



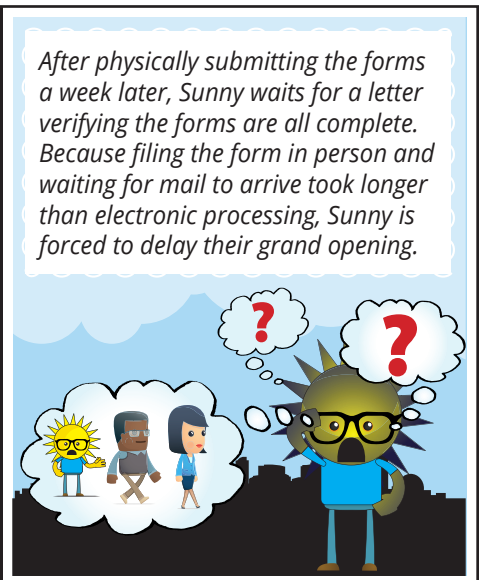
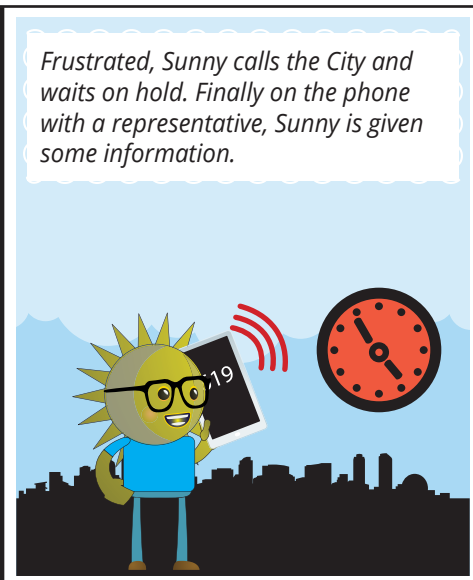
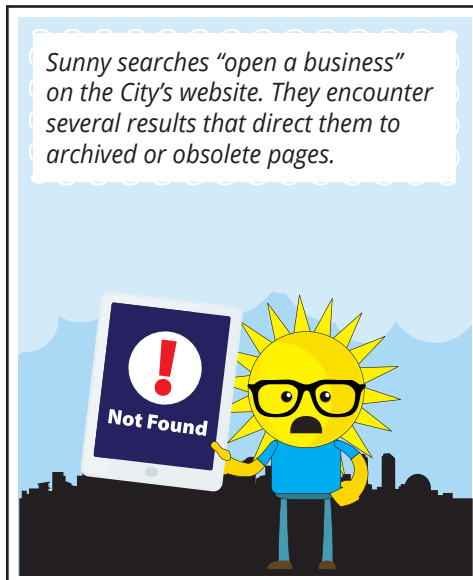
Sunny's Story: Chapter 1

Opening a Surfboard and Burrito Shop

A resident of San Diego, Sunny is looking to open a new surfboard and burrito shop. They aren't sure what they need to open a business.



POSITIVE Sunny found this experience positive because the design was personalized, simple, convenient and centralized. Sunny's needs drove the process.



NEGATIVE Sunny found this experience negative because the process was confusing, decentralized and disorganized. Because only one service channel was offered, wait time were exaggerated.

PRINCIPLE #2: Holistic Digital Innovation

What is it?

A digital-first strategy does not mean digital only. Adding a digital element to an established service helps open the door to making overall improvements through a holistic evaluation and redesign of the existing process.

Both customers *and* employees need access to digital tools to easily accomplish their interactions with the City. Customers who are comfortable using well-designed, easy-to-use digital self-service options can free up phone lines for other customers who need assistance from a person. Likewise, when an employee assists a customer (over the phone or through another channel), they need access to the same digital solution to serve the customer quickly and effectively.

If a customer isn't directly engaging with a digital service, chances are that the employee assisting the customer on the phone would be interacting with a digital tool.

Why does the City need it? What are the benefits?

Digitizing services does not mean simply adding a button to the website or creating a fancy new app; instead, it entails comprehensively updating processes to improve efficiency along with driving progress through technology and innovation. Part of the challenge the City faces is that many digital tools do not meet the expectations of customers *or* employees. In these situations, challenges arise that prevent customers' basic needs from being met and hinder employees from efficiently serving customers – causing frustration for **everyone** throughout the process.

The development of new digital services improves the technology to which customers and employees have access. Once this digital foundation is in place, it opens the door to expanding the number of channels on which a service can be offered.

The reality today is that customers' basic needs are not being met consistently, whether they call in through the phone or attempt self-service through digital channels. For example, starting, stopping or updating contact information with the Public Utilities Department requires a phone call, emails or filling out a form. If a customer fills out a form, it goes into an email queue that employees must process. This is an inefficient use of customers' and employees' valuable time. In the desired future state, most customers can use simple self-service options, tightly integrated and automated with the same system that employees use – creating a seamless customer experience and eliminating complicated, cumbersome data entry tasks for employees.

The Impact of Self Service

When people are given more self-service options to engage with the City, the demand is more evenly distributed among the City's available resources. For example, some calls that might have gone to a customer service representative (CSR) can be deflected to a self-service option, freeing CSRs to handle more complex inquiries. This makes call volumes more manageable and allows for efficiency gains. In turn, opportunities for CSRs to deliver a meaningful and fulfilling customer experience increase.

Implementing an integrated customer engagement platform allows traditional communication channels to be optimized. This includes features like phone systems that allow callbacks or text links to self-service web links. The principle of holistic digital innovation incorporates the complete customer experience. Digital isn't just an app; it's a platform that empowers customers and employees to accomplish their desired objectives and outcomes in the easiest way possible.

Meeting people where they are is more than just an issue of consideration. It's also an issue of equity. Not everyone has time to wait on hold for hours or resources to complete applications in person, nor does everyone have the knowledge or equipment needed to access digital assets. Implementing well-designed digital services allows City employees to route customers to the appropriate service channel that best suits their needs. Digital services also divert those able to use self-service away from traditional channels, freeing up lines for people who require them. Internally, employees can more effectively serve customers who need help because they can access the same easy-to-use digital services.

Holistic Digital Innovation in practice:

At the City, the Environmental Services Collections team works tirelessly to transport solid waste from the source to the Miramar Landfill. Sometimes, route impacts can cause service delays. The City developed a service delay alert system built into Get It Done to inform residents that their collection service might be delayed. If a customer is using Get It Done to report a missed collection and their address is in an area where the collection route was impacted, they will receive a notification informing them their collection service is delayed and to expect a pickup by the new predicted time. This process is holistically innovated, as residents can report their missed collection. The City is adequately equipped with digital tools to provide clear and transparent information about the existing capacity to deliver on a request. Employee time is saved from closing reports with known delays and customers are empowered to use digital self-service mechanisms to look up their collections schedule.

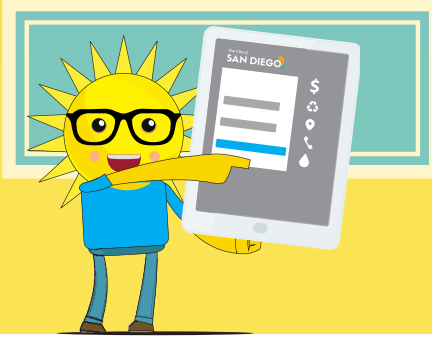


Sunny's Story: Chapter 2


Sunny Moves To A New House

Sunny moves to a new house and remembers they need to contact the City to start their water service.

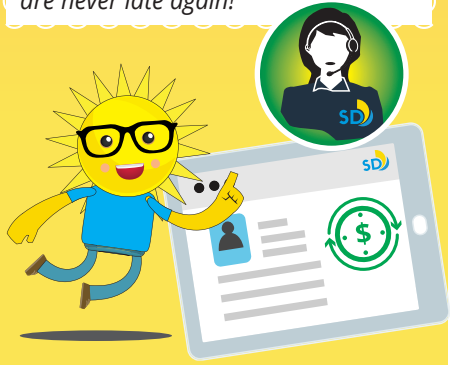
Using the City's universal bill portal, Sunny easily creates an account linked to their new address and contact information, starts the water service and adds their other utilities to this account.



One day, Sunny forgets to pay their utility bill and contacts the City's centralized call center to make the payment. Using the phone tree, Sunny selects a convenient call back time.

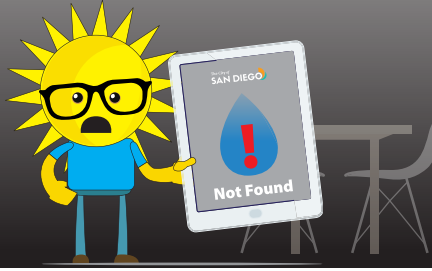


When they receive a call back, the agent uses Sunny's phone number to easily pull up their account and process the transaction. The agent also helps Sunny enroll in autopayments so they are never late again!

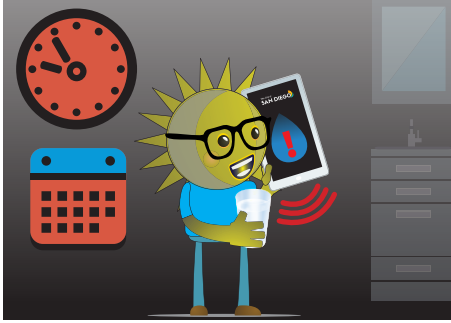


POSITIVE Sunny found this experience positive because the service was easy to access, and they were able to engage through a variety of channels that all shared the same information.


Sunny can't find any info about activating their water service online but does find a phone number for the water department. But it's the weekend and phone lines are not in service.



Sunny calls on Monday morning and gets through to a representative after a long hold. Sunny explains their need and the representative sets them up with a new account.



A few months later, Sunny realizes they haven't received any water bills. They call the department phone line and wait on hold again. Sunny becomes frustrated and gives up. Weeks later, their first bill arrives for a large sum. Sunny calls back again, waits on hold and explains to they're unable to pay the full amount. The service representative can't help and is burdened with trying to cheer Sunny up after an unpleasant customer experience.



NEGATIVE Sunny found this experience frustrating and stressful. They've considered writing a negative survey and drafting an e-mail to their council representative. They've lost faith in the City.

PRINCIPLE #3: Harmonized Service Delivery

What is it?

Creating a harmonious process involves integrating technology, Citywide processes and services delivered. With a seamless customer experience, people can accomplish what they set out to do more efficiently.

Why does the City need it? What are the benefits?

Harmony helps hold the City accountable to high levels of excellence. Currently, the level of service across departments and services can vary significantly. Customers expect the same service levels regardless of with which department they are engaging. The principle of harmonious service delivery necessitates breaking down departmental divides, allowing information to flow more freely and increasing transparency. For example, in a fully integrated system, a customer can receive information or request a service on any City offering without knowing which department performs that specific operation.

Harmonized Service Delivery in practice:

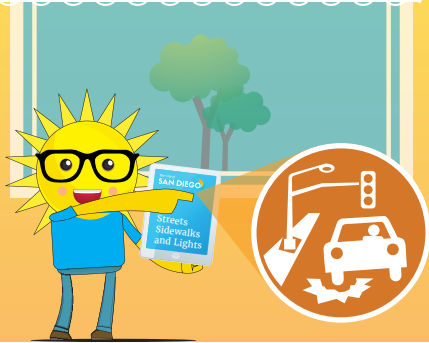
The Office of ADA Compliance & Accessibility is responsible for ensuring the City's compliance with the Americans with Disabilities Act (ADA). They must engage with many internal departments, including Transportation, Engineering & Capital Projects, Parks & Recreation and more. When a service request arrives from a member of the public (for a curb ramp request, for example) via the channel of their choosing (by phone, e-mail, Get It Done report, etc.), the Office of ADA Compliance & Accessibility must then coordinate a plan of action to initiate the project with the respective responsible department. Additionally, the department must report to other agencies for compliance tracking. By streamlining the process through a central mechanism, in this case using Get It Done as a tracking system, members of the Office of ADA Compliance & Accessibility are empowered to harmonize the service delivery along with the other responsible departments. In addition, with a system, they now can publish a public map of ADA reports within the City of San Diego, ensuring accessibility for San Diegans is prioritized.

Sunny's Story: Chapter 3 Reporting A Pothole

While driving home from their shop, Sunny hits a pothole and decides to report it to the City.



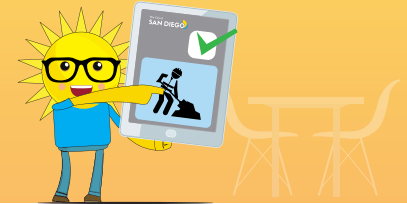
Using the City's app, Sunny creates a report. Before submitting, the report generates a list of other road projects that intersect with this pothole and creates a resolution timeline.



A day later, San Diego experiences an unexpected rainstorm that impacts how street crews prioritize pothole repair. Sunny receives a notification letting them know why their pothole repair is delayed and offers an updated timeline.



After the pothole is repaired, Sunny is emailed photos showing the crew's good work and completes a feedback form. Even though the repair was delayed, Sunny gave positive feedback because the City was proactive and communicative. Now, supervisors can share this positive feedback with the crew who completed the work, recognizing their contributions and improving overall employee morale.



POSITIVE

Sunny found this experience positive because the process was well established, and expectations were managed and communicated at the right moments. They didn't need to reach out for an update and had accurate information at all points in the process.

Sunny reports the pothole online. Months later, they get a notification that their report is closed but no details or photos are shared.



While driving to work, Sunny is in a great mood until they hit a pothole in the same spot.

Confused, Sunny calls the City helpline to complain.



Once on the phone, a representative informs Sunny that their report was closed because the department is planning on resurfacing this road in the next year.

Sunny is frustrated and walks away from this experience not trusting that closed issues are actually resolved.



NEGATIVE

Sunny found this experience negative because they had no expectations and no communication around resolution time or processes. To acquire updated information, they needed to proactively reach out after an unsatisfactory resolution was delivered.

Section 3:

Recommendations

RECOMMENDATION #1:

Living CX Report Card

To measure the effectiveness of service delivery, the City should implement a standardized method for tracking and assessing the impact of all public-facing services. To achieve this, the City must first start with an inventory of all services it offers. **Developing an inventory of services will serve as both a baseline and a living document to track future improvements.** To track progress, the City needs to create an accessible place for this information to live.

Inventory information should include an analysis of all public-facing services the City provides, documenting information about the system used, if any, and recording metrics related to its effectiveness. The index should include information and scoring on the following criteria to generate a final score according to a Citywide scale:

1. General Details

- a. Service name
- b. Department responsible
- c. Volume of requests
- d. Number of full time equivalent (FTE) to address requests
- e. Number of potential users (to measure customer impact)

2. Technology

- a. Channels the public can use to access this service (mobile app, phone call, web, chat, etc.)
- b. What system does the public use to access this service?
- c. What system do employees use to fulfill this service?

3. Process

- a. Process map
- b. Process efficiency score¹
- c. CX score¹
- d. Year the process last reviewed / evaluated / redesigned

4. Customer Feedback

- a. Type of feedback loop
- b. Customer satisfaction score and survey completion rate

5. Equity

- a. Available languages
- b. Equity score¹

6. Service standards

- a. Current backlog
- b. Current and target completion time
- c. Current and target satisfaction levels (customer surveys)
- e. Resources needed to meet target

¹Denotes subjective score with specific grading guidelines to be determined.

Different factors recorded in the service inventory can be weighted and used to calculate a service's overall score. Based on the number of customers impacted, customer satisfaction, digital availability and other measurements, the service can be prioritized for a redesign or other intervention; depending on how a service scores in various areas, the service can be targeted for specific improvements. Until both

an inventory and a service analysis are conducted, it is challenging to determine how to best deploy limited resources to prioritize improvements.

The ultimate deliverable is a living City service “report card.” A version of the report card should be publicly accessible and understandable, with services scored on a regular cadence (i.e., quarterly, bi-annually, etc.). Services’ overall scores will serve as an objective, transparent means to prioritize which areas to improve first and to balance the public’s needs with limited City resources.

RECOMMENDATION #2: Build “No Wrong Front Door” Digital Assets

While the City has updated the design of its digital assets, updating digital content has lagged and caused frustration due to inaccurate information. A structured Knowledge Management Program (KMP) will help ensure that City-owned digital assets host information that is reviewed and updated regularly. In general, establishing a KMP streamlines information, implements knowledge management best practices and creates a system for content updates driven by customer feedback.

For example, many departments have decentralized frequently asked questions (FAQs) hosted across several pages. An opportunity exists to implement an effective KMP to manage and host all FAQs within one platform with standardized processes for adding, updating and archiving content. As a pilot project, an effort is currently underway to consolidate all Environmental Services Department (ESD) FAQs on Get It Done. When completed, all FAQs related to ESD will be accessible through one knowledgebase, representing a single source of truth.

Visitors to sandiego.gov can’t always trust that the information presented is accurate. Fewer than half (49%) of visitors were able to complete their visit, as measured by intercept feedback surveys throughout the last 12 months (as of 5/26/23). As a result, there is a need for content strategists to look at why customers are visiting and find ways to better meet their needs.

More information isn’t always better, and an active effort to reorganize, revise and archive obsolete information is essential to make information accessible and reliable. While establishing a content strategy entails significant up-front effort and ongoing maintenance, benefits include reducing the number of inquiries that employees must manually respond to, along with customers who are empowered by tools that quickly resolve their needs. Providing easy, understandable access to self-service information helps deflect email, phone and other inquiries that are more costly and time-intensive to process.

Content Strategists are essential to champion customer feedback and holistically evaluate, re-write, archive and refine content, as well as drive improvements to meet user needs.

RECOMMENDATION #3:

Use CX Feedback to Drive Process Improvements

The City can have a well-designed website and easy-to-use mobile app, but if people aren't getting the services they need in a timely manner, their expectations are not met.

Get It Done uses two different metrics to track satisfaction – Customer Effort Scores (CES) and Overall Satisfaction (OSAT). Since tracking these metrics, the CES score has consistently been significantly higher than the OSAT score. These scores indicate that people generally find it easy to report a problem. However, they are dissatisfied with the level of service provided. Without either score reaching a higher standard, customers will continue to feel unsatisfied and hold a negative impression of City services.

A. Create feedback loop for all services

A feedback loop should be included for *all* City services and information. Opportunities currently exist for customers to provide feedback on sandiego.gov. That feedback is measured and tracked on the Medallia platform. Likewise, customers receive a case closure email containing a survey link on Get It Done. Without a formal feedback mechanism, it is impossible to accurately and comprehensively understand how customers feel City services are performed and what City employees can do better.

As part of the inventory of services, whether the service contains a feedback loop should be noted. Services that do not have a feedback loop should be flagged and prioritized.

B. Implement Citywide Performance Coaching Program

Service delivery turn-around time and quality of asset repair are key contributors to overall satisfaction when interacting with the City. In many instances, Get It Done reports take too long to be resolved by asset-owning departments. The operational processes need to be analyzed to optimize resources to address this over-arching concern of service delivery time. Extensive groundwork has been laid within the Performance Management division of the City's Performance & Analytics Department to establish a framework for performance coaching. An example of this is a Performance Coach partnering with the City's Transportation Department to improve customer communication, prioritization methodology and expectation setting for streetlight repair requests.

To realize the true potential of this framework, the City should initiate a formal Performance Coaching pilot program to prove the effectiveness of this methodology and demonstrate its value through customer experience impact. This program would leverage a systematic approach to tackling

some of the most complex and under-performing City services by following a methodology founded in Lean Six Sigma fundamentals:

- ⇒ **Assess** – identify services with high potential for customer satisfaction and efficiency gains.
- ⇒ **Define** – establish as-is process maps and identify value-added and non-value-added activities.
- ⇒ **Measure** – record data such as the amount of time activities take and their performance levels.
- ⇒ **Analyze** – conduct analysis to identify areas to improve.
- ⇒ **Improve** – implement process changes to realize improvements.
- ⇒ **Control** – continuously measure the effects of process changes and ensure changes are being followed.
- ⇒ **Monitor** – utilize data analytics tools to maintain the efficacy of the process improvements.

Through an accelerated and focused pilot program with highly skilled and motivated individuals, clearly defined scopes of work, and agreed-upon measures of success, the City can begin to dive deeply into the services that most impact the customer experience and forge a path toward optimizing and cultivating an environment of continuous improvement.

RECOMMENDATION #4: Use Technology to Enhance Equity

Assessing and cataloging City-offered information and services creates an opportunity to ensure current and future offerings are accessible to all San Diegans. Reviewing services and information through an equity lens encourages the City to leverage technology to support communication channels for all people, meeting them where they are.

A strong digital foundation makes it possible for customers to complete tasks through self-service. This provides the necessary infrastructure for employees to interact successfully with customers when hands-on assistance is needed. For customers comfortable with digital services, deflecting inquiries from phone calls to self-service options frees up phone lines and can reduce demand on resource-constrained contact centers. Recently, the Public Utilities Department launched web forms to collect information from customers regarding starting, stopping and

Some people may be more comfortable with phone calls, while others may prefer chat, social media or text. With the right digital technology foundation in place, the City can more readily add new channels and provide consistent service across all platforms.

updating account information. This has already begun to reduce call hold times, allowing people to avoid making a phone call.

Providing City services and information at the right time, in the right place and through the right channels empowers people.

A. Language Accessibility

Information needs to be understandable and available in the languages spoken in San Diego's communities. Therefore, **the City should develop a Language Access Plan to assess and guide the City's efforts to increase language accessibility and identify priority content areas and services.**



In addition to language accessibility, the City should adopt **readability standards to ensure information is understandable for most people.** Utilizing an 8th-grade maximum reading level provides an opportunity to simplify confusing information. This makes accessing and understanding information easier and demonstrates consideration for more people's time and varying backgrounds.

B. Training & Outreach

According to the U.S. Census (2017-2021), 97% of households in the City of San Diego have a computer and 93% have a broadband internet connection. Even though a household has an internet connection or a computer, not *everyone* is comfortable with technology or with accessing government services.

However, everyone should be given the opportunity and ability to access the information hosted on digital channels. To help offset the effects of the digital divide, dedicated efforts are essential to connect and train community members on how to use Get It Done and access all the City's digital assets. Expanding on efforts underway with SD Access4All, **an outreach plan should be developed and include an analysis of geographical gaps in San Diego where the population is underutilizing the City's digital resources, as well as the best methods of outreach and training to close these gaps.**



In addition to a targeted outreach plan, a "Street Team" will provide hands-on training to community members. In this future state, community leaders are trained and empowered to advocate for how to use and access the City's digital services. This will help reach people who would benefit from accessing digital services but do not know what is available, how to use it or other issues preventing easy access. Targeted efforts to reach communities and populations that are not accessing City services and information at baseline levels throughout the City will help remove barriers and ensure equitable access is provided.

Section 4:

Required Resources

Historically, to support the development and ongoing maintenance of Get It Done (representing the City's investment in digital services), an average of only ~0.67 FTE have been added annually (over the past ~9 years). This level of resourcing allows the Get It Done team to “keep the lights on” and make minor enhancements to the platform. However, as public demand grows, and digital services become more critical to basic City operations, a more intentional, comprehensive investment in digital services – Citywide – is needed to reach the next level.

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total FTE*	1	4	4	5	5	5	5	6	6
FTE Added Per Year	1	3	0	1	0	0	0	1	0

**Members of the Technology & Innovation Division of Performance & Analytics Department*

To adequately implement the City's Digital Customer Experience Strategy and eventually a 3-1-1 consolidated contact center, **a significant investment of one-time and ongoing resources will be necessary to ensure the success of both the digital services and the contact center.** A contact center relies on a strong digital foundation. The question isn't whether to invest in digital services **or** a contact center but how much to invest in digital services to better serve all customers *and* set the contact center up for success.

A larger investment in digital services will result in more satisfied customers being served faster, with more customers served via self-service options and a lower total phone volume, leading to shorter overall hold times.

Cost Savings

While there are costs associated with creating effective digital services, there are also savings. Some savings are easier to calculate than others – such as reduced hold times, faster employee onboarding and calls deflected to self-service options. Other benefits, like improved customer satisfaction, are harder to calculate but can result in savings from fewer resources spent recovering from negative customer experiences. For example, if customers can accomplish their task on their first attempt and avoid having to contact multiple people, multiple times to resolve an issue, this results in savings – multiplied over thousands of interactions. This better utilizes City resources and results in higher customer satisfaction.

The Cost of Digital Services:



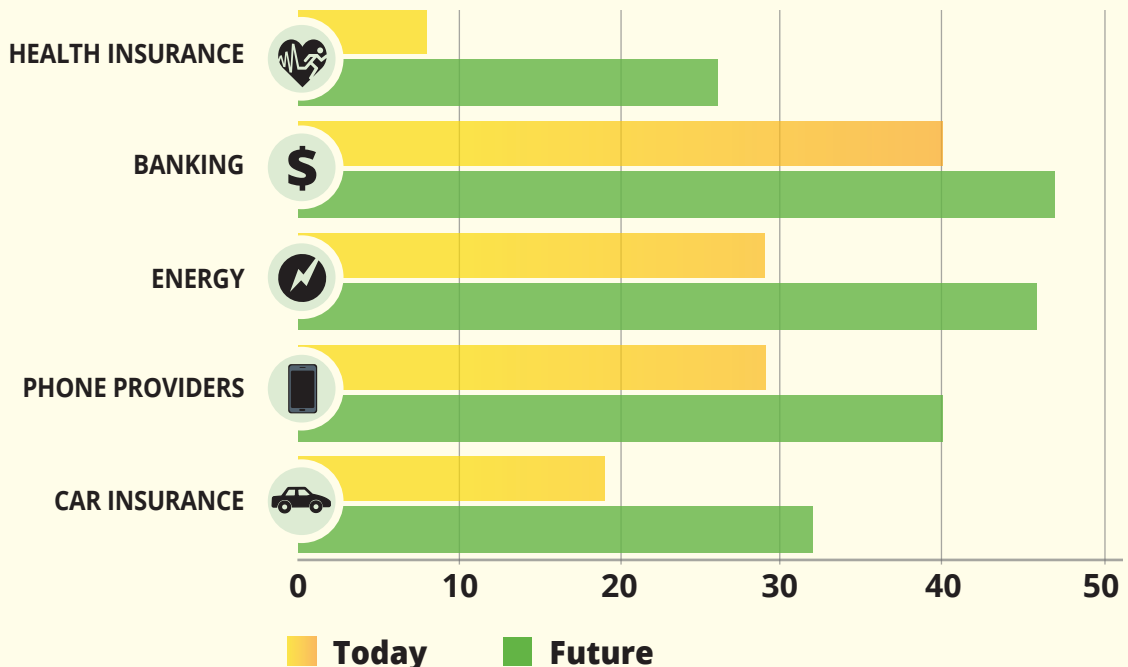
DIGITAL COSTS LESS

	Phone	Live Chat	Digital Messaging
CUSTOMERS PER HOUR PER AGENT	8	15	60
CUSTOMERS PER HOUR PER AGENT	\$10	\$3	\$1
AGENTS NEEDED TO GET THROUGH 200 INTERACTIONS IN 1 HOUR	25	13	3
ASSOCIATED COSTS FOR 200 INTERACTIONS	\$2,000	\$3	\$1

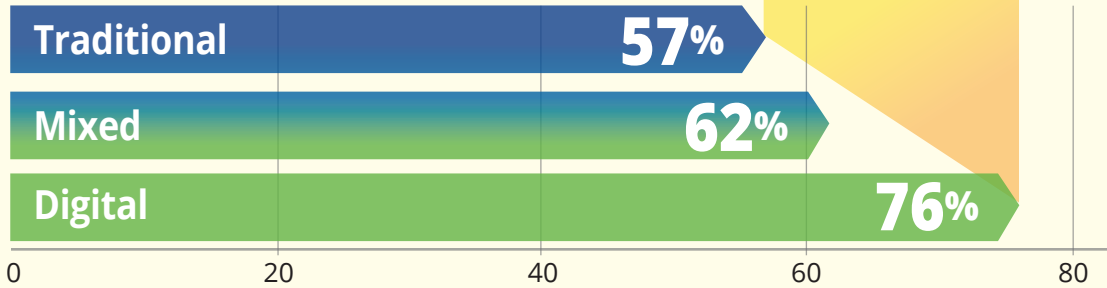


PEOPLE WANT TO USE DIGITAL AND ARE MORE SATISFIED WHEN THEY HAVE DIGITAL ACCESS

Percentage of Customers Who Want to Use Digital Services for Nearly All (75 - 100%) Customer Service Inquiries



Those who used digital channels reported **19% higher satisfaction** than those who only used traditional means.



ON AVERAGE, ORGANIZATIONS THAT ADOPT DIGITAL SERVICES SEE...



15 - 20%
increase in
customer
satisfaction



20 - 40%
cost reduction



DID YOU KNOW

62% of US customers have stopped doing business with a brand due to poor customer service.



SOURCES:

"Transform the Contact Center for Customer Service Excellence." Forrester, <https://www.forrester.com/report/Transform-The-Contact-Center-For-Customer-Service-Excellence/RES75001?objectid=RES75001#endnote7>.

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Higher Satisfaction at Lower Costs: Digitizing Customer Care. https://www.mckinsey.com/~media/mckinsey/industries/technology%20media%20and%20telecommunications/telecommunications/our%20insights/lessons%20from%20digital%20telcos%20five%20initiatives%20to%20improve%20business%20performance/higher_satisfaction_at_lower_costs_digitizing_customer_care.pdf.

Breuer, Ralph, et al. "Service Industries Can Fuel Growth by Making Digital Customer Experiences a Priority." McKinsey & Company, McKinsey & Company, 30 Apr. 2020, <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/service-industries-can-fuel-growthby-making-digital-customer-experiences-a-priority>.

"Customer Self-Service (CSS): What & How to Do It Right." Gartner, <https://www.gartner.com/en/customerservice-support/insights/customer-self-service>.

Resource Needs

Resource needs are divided into two sections: **Digital Services** and **Contact Center**. An investment in digital services must happen before the contact center is layered on top, as it lays the necessary foundation for long-term, sustained growth and success. Attempting to launch a 3-1-1 contact center without first investing in digital services sets the program up to fail: customers' only option will be to call, wait on hold for extended periods and reach employees who won't have the right tools to assist and resolve issues. Later, if a decision is made to develop a centralized 3-1-1 contact center, a separate, dedicated team, and resources will be needed to initiate and operate this program.



1. Digital Services

Additional full-time equivalent (FTE) positions and non-personnel expenditures (NPE) budget will be needed for each phase of implementation. A Chief Digital Services Officer will need to be designated. As each phase progresses, more accurate resource estimates will be possible.

PHASE 0: Immediate Needs to Address Current Priorities [Year 1]

Additional FTEs: 4	Additional NPE Budget: \$1M
⇒ One (1) FTE for Quality Assurance & Training *	
⇒ Three (3) FTEs for Current Program Facilitation (to support work with ESD + PUD)	

* Required to address Audit recommendations within permissible timeline.

PHASE 1: Assess & Fix [Years 2-3]

Additional FTEs: 4

Additional NPE Budget: \$1-3M

- ⇒ Four (4) Program Coordinator FTE
 - *Each will implement one of the four (4) recommendations outlined in this strategy.*
- ⇒ Support improvements with Public Utilities Customer Service Center.
- ⇒ Support work related to Environmental Services digital billing service modifications.
- ⇒ Determine how to prioritize and package work associated with digital improvements to support future centralized contact center operations (i.e., assess Police Non-Emergency digital service needs). Identify what additional resources are needed.

PHASE 2: Build [Years 4-7]

Additional FTEs: 10+

Additional NPE Budget: TBD Estimated at least \$5M

- ⇒ Build and deploy improvements identified in Phase 1. As an example, the Living Service Report Card developed in Phase 1 will drive work in Phase 2 to align customer-facing digital service offerings and the necessary digital technology foundation to support a unified approach.

PHASE 3: Maximize & Expand Channels [Years 8+]

Additional FTEs: TBD

Additional Budget: \$TBD

- ⇒ At this point, the digital foundation built during Phases 1 and 2 should be scalable to allow additional communication channels. For example, a centralized contact center/3-1-1 readiness assessment can be conducted during this phase.

2. Contact Center

Additional FTEs: 19

Additional NPE Budget: \$12M - \$22M

Budget projections will need to contemplate costs, including but not limited to physical infrastructure (rent, facilities improvements, equipment, etc.); system implementation (software, training, development); ongoing license costs; energy and utilities; and personnel (FTEs). During a consolidation, some resources may transfer from departments and Council Offices with staff who perform customer contact-related roles. It is anticipated that this effort will not be cost-neutral to properly staff a new customer service offering.

In addition to a governance framework with representatives from the Executive Team and all participating departments (10+), the contact center implementation team itself will consist of the following roles:

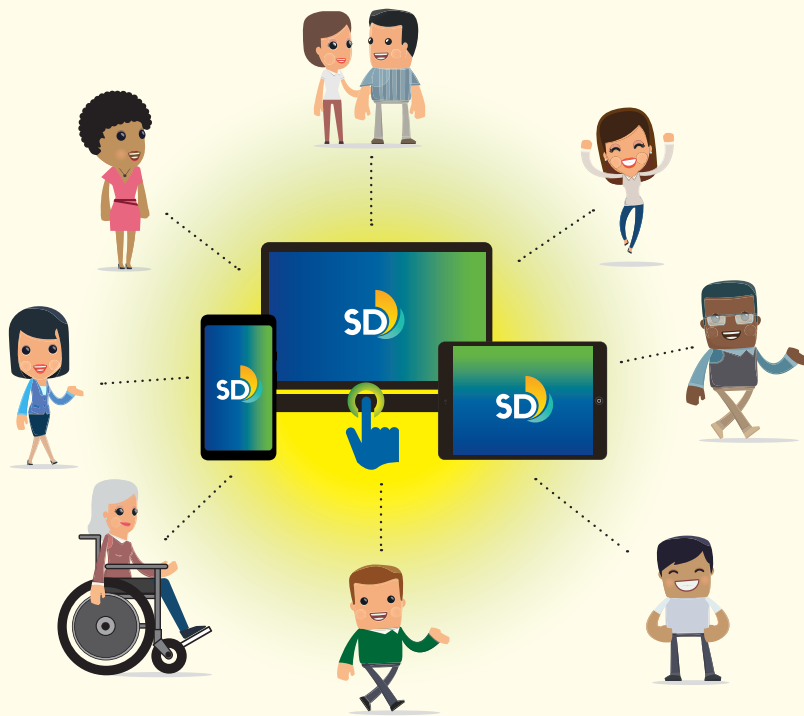
- ⇒ **Contact Center Director** (1 x Director / Deputy Director)
- ⇒ **Project Manager** (1 x Program Manager)
- ⇒ **Asst. Project Manager / Operations Coordinator** (1 x Program Coordinator)
- ⇒ **Process Leads** (2 x Program Coordinator)
- ⇒ **Customer Research** (2 x Program Coordinator)
- ⇒ **Knowledge / Communications Leads** (2 x Program Coordinator)
- ⇒ **Technical Lead - Phone System / IVR** (1 x Program Coordinator)
- ⇒ **Technical Leads - Customer Relationship Management (CRM)** (2 x Program Coordinator)
- ⇒ **Technical Leads - Integrations** (1 x Program Coordinator)
- ⇒ **Change Management & Training Leads** (2 x Program Coordinator)
- ⇒ **Legal & Compliance/Contracts Lead** (1 x Program Coordinator)
- ⇒ **Bilingual Knowledge Leads** (2 x Program Coordinator)
- ⇒ **Marketing & Outreach** (1 x Program Coordinator)

Contact center staff is not accounted for in this implementation team staff matrix and will need future analysis. In addition, the City's Recognized Employee Organizations (REOs) will need to be included in the planning process as part of Meet & Confer requirements.

Some of these roles will transition to the eventual contact center operations team. Most likely, a phased approach will dictate that most members of the implementation team will need to continue working on adding new and innovating existing service offerings while a separate team runs the contact center itself.

These resources are the tools that allow us to build and achieve a vision of an excellent customer experience in San Diego and deploy digital tools that serve people's unique needs.

San Diego has the potential to be a national leader in customer experience, with an investment in resources that build upon existing foundations.





Performance & Analytics

VISION:

*A City that can confidently confront
the complex and uncertain challenges
of today and tomorrow.*

MISSION:

*We discover, innovate, and optimize
to help City employees better serve
San Diegans.*

