

# Incorporating A Customer Service Initiative Into An Engineering Process

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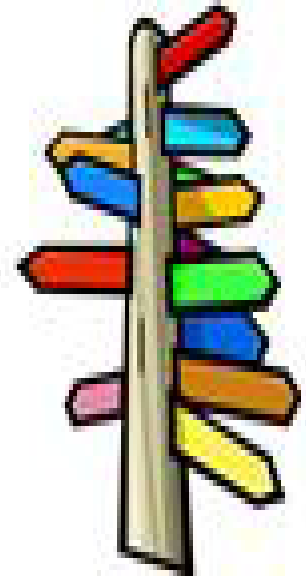


# Engineering's Customer Service Program

- Purpose: To identify and implement strategies that provide a high level of personalized assistance and service to customers and communities by:
  - ❖ Keeping citizens informed & providing partnering opportunities
  - ❖ Responding to citizens concerns
  - ❖ Considering neighborhood attributes
  - ❖ Assisting Project Managers

# Life Prior to the Integration

- Relied Heavily on Consultants
- Focus was on Construction Only
- Many Questions - Few Answers
- Review Process was “Ad Lib”
- Set the Foundation From Which to Grow



# Process to Refine Previous Program

- Allocated Staff
- Obtained Involvement From Other Similar Type Departmental Initiatives
- Solicited Involvement of Users of the Program Involved – We Had an Engineer on the Team.
- Hosted Two Focus Groups
- Held Individual Group Meetings
- Provided Updates via Emails



# Three Key Components of Enhanced Customer Service

- ✓ Customer Service Action Plan
- ✓ Customer Service Project Summary
- ✓ Customer Service Phone Line

# Customer Service Action Plan

## □ What is it?

- ☞ List of Strategies
- ☞ List of Project Message
- ☞ Recommendation on Consultant Services

## □ Considerations:

- ☞ Project Scope & Timeframe
- ☞ Location
- ☞ Number of Parcels Impacted
- ☞ Previous Media Coverage & Community Contact
- ☞ Type of Community Disruptions/Public Inconveniences
- ☞ Identification of Project Messages

# Customer Service Action Plan Development Process

- **Step One: Development of Customer Service Action Plan (Design and Construction)**
  - ❑ Specialist notified at project nomination and turn over
  - ❑ Specialist completes needs assessment and prepares draft action plan
  - ❑ Specialist meets with project manager to finalize action plan. Invitees could include:
    - ✓ Customer Service Consultant
    - ✓ Construction Manager
    - ✓ Community Representatives

# Customer Service Action Plan Development Process

- **Step Two (If warranted): Select Consultant Services and Incorporate Additional Strategies**
- **Step Three: Obtain Buy-In**
  - PM's Supervisor
  - Department's Communication Team (OOD)
- **Step Four: Implement the Action Plan**
  - Ownership with Project Manager
  - Process ownership - Customer Service Specialist
- **Step Five: Summary Documentation at Turn-Over and Closure**
  - Customer Service Specialist or Consultant prepares summary of CS activities

# Benefits of A Customer Service Action Plan

- Allows for Proactive Strategy Development
- Comprehensive Historical Piece Crucial for Consistency in Turnover
- Establishes Uniformity of Project Messages
- Reinforces Accountability



# Customer Service Project Summary

- **Contains:**
  - Issues Generated by Customers
  - Resolution to issues
- **Based on Analysis of:**
  - Public Meetings
    - Review Public Meetings summaries from Consultants
    - Debrief with Project Mangers after public meetings (no consultant)
  - Phone Line Database
  - Correspondences Received

# Customer Phone Hotline

- Centralized
- A Project Informational Sheet (Template) and Fact Sheet are Needed
- Use of Project Locator
- Tracking and Closing Calls
- Phasing of Projects to Provide Excellent Customer Service

# Essential Elements for Integration

## Essential Elements

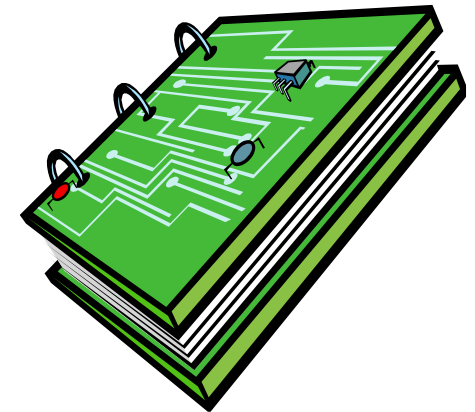
- Centralized Efforts
- Work Standards/Tools
- Established Workflows
- Proactive vs. Reactive
- Continuous Improvement
- Ownership Must Remain with Project Managers

# Element: Centralization via Customer Service Specialists

- **Responsibilities**
  - Monitor Work Plans' Progress
  - Identify and Address Issues
  - Serve as a Liaison Between Project Manager and OOD's Communication Team
  - Respond to Engineering Customer Service Phone Line
  - Track and Close Phone Inquiries
  - Incorporate Improvement Strategies From Lessons Learned

# Element: Standards

- **Establish Criteria**
  - Press Releases
  - Notification Letters
  - Media Relations
  - Presentation at Community Meeting
  - Website Design



# Element: Tools

## □ Development of Tools

- Reference Guide for Customer Service Specialist
- Templates for Needs Assessments and Action Plan
- Fact Sheet Template



# Elements: Work Flows

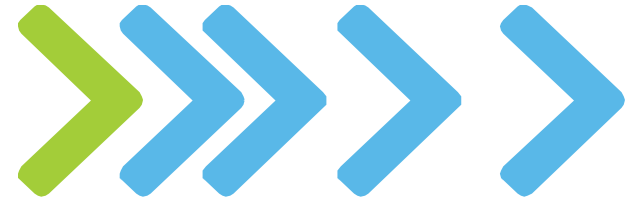
- ❑ Goal: Use Existing Processes/Activity; Not to Create
  
- ❑ **Action Plan Development Initiation – How?**
  - Planning – Nominations
  
  - Design and Construction – Turnover
  
- ❑ **Routing and Escalation of Phone Calls:**
  - Planning - To project manager
  - Construction – To consultant and then project manager

# Lessons Learned

- ✚ Change Management Requires Patience
- ✚ Activities Cannot Create Additional Tasks for Project Managers
- ✚ Funding Must be Considered
- ✚ Establishing Clear Messages is Paramount



# Moving Forward



- Ensuring Excellence Through Restoration
- Establishing an Annual Evaluation, Including Revisiting a Customer Service Survey
- Inclusion of Real Estate Activities

# Questions



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