

The 5-Star Customer Service Playbook

A Practical Guide for Municipal Governments



introduction



This playbook provides a practical, easy-to-use framework to help public servants deliver consistent, respectful, and responsive customer service. It is organized around four core pillars that support high-quality service delivery.

How to Use This Playbook

- Use each pillar as a building block for your department or organization.
- Adapt templates and examples to your local context.
- Review and update periodically.

4 PILLARS FOR BUILDING QUALITY CUSTOMER SERVICE

1

service standards + protocols

Standards + protocols help everyone understand what great service looks like and how to deliver it. They keep things consistent, reduce guesswork, and give staff confidence to respond professionally - helping customers feel respected and comfortable.



2

knowledge + information resources

When staff has the right knowledge and easy access to information, they can answer questions accurately, solve problems faster, and provide confident, reliable service—helping customers feel supported, informed, and valued.



3

training + development

Professional development strengthens staff expertise in their field, which enables them to solve problems accurately, make sound decisions, and communicate with credibility—creating smoother interactions and more confident, reliable service.



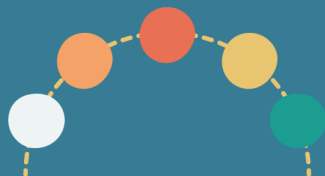
4

reporting + continuous improvement

Feedback, reporting, and continuous improvement helps teams learn what's working and what's not. By spotting issues and refining how things are done, you're better prepared to give customers the best experience every time.

why this all matters

Phoenix, Arizona: a success story



Phoenix is often considered a gold standard in municipal customer service because it built an organization-wide system to consistently deliver results. Rather than layering customer service on top of its existing system of services, they re-evaluated their processes from the ground up to cut inefficiencies, break down silos, and focus on what actually mattered to the resident experience. In 2023, the City of Phoenix earned a Platinum-level certification from Bloomberg Philanthropies “What Works Cities” program which recognizes local governments that excel in using data, allocating resources, improving services, and engage residents — all core to quality customer service. The Phoenix story is powerful because it highlights how delivering quality customer service requires a strong organizational framework for efficiency and excellence.

02



1. Service Standards and Protocols

Municipal government exists to serve its community. Every interaction shapes public trust. That's why clear, measurable service standards and well-defined protocols are important to ensure service delivery is consistent, equitable, transparent, and aligned with community expectations.

Without defined standards, service delivery can vary by department, staff member, or circumstance. Clear protocols reduce ambiguity, minimize delays, improve coordination, and provide measurable benchmarks for success. They also empower staff by giving them clarity, authority, and tools to respond effectively.

By implementing structured service standards and protocols, municipalities move from reactive problem-solving to proactive, strategic service delivery. The result is a government organization that is reliable, responsive, and trusted—one that consistently delivers on its commitment to serve the community with excellence.

01 Citizen Service Charter

02 Escalation Matrix and Response Scripts

03 Tone and Language Guidelines





01 Citizen Service Charter

A Citizen Service Charter is a public commitment that defines the level of service residents, businesses, and visitors can expect from their local government. Its value lies in setting clear expectations, improving accountability, and strengthening trust between the municipality and the community it serves. It defines the role of not only the municipal employee, but of the customer, encouraging mutual respect to reduce conflict during interactions.

Want to see an example?

San Jose, CA: <https://www.sanjoseca.gov/your-government/departments-offices/planning-building-code-enforcement/customer-service-charter>

Town of Cobourg, ON: <https://www.cobourg.ca/our-government/customer-service/>

02 Escalation Matrix and Response Scripts

An escalation matrix provides municipal employees with a clear framework for determining when and how to elevate issues during customer interactions or service delivery challenges. Its value lies in improving consistency, protecting staff, and ensuring that complex or sensitive situations are handled by the appropriate level of leadership.

03 Tone and Language Guidelines

Tone and Language Guidelines provide municipal employees with clear direction on how to communicate with residents, businesses, and stakeholders in a professional, respectful, and consistent manner. Their value lies in shaping the quality of customer interactions and reinforcing the organization's service culture.





2. Knowledge and Information Resources

Access to the right information and resources plays a big role in delivering great customer service - especially in a municipal setting. Residents look to their local government for clear answers and help navigating issues, so staff need the tools and information to respond with confidence. Being able to quickly find policies, service details, and the right internal contacts allows to provide the best possible service to customers.

Information and resource sharing not only improves efficiency, it also builds trust with the community by showing people that the organization is responsive, transparent, and helpful. Well-informed staff are better prepared to anticipate needs, connect residents to the right services, and work across departments to find practical solutions. The result is a smoother experience for residents and a more effective, service-focused local government.

**Departmental
FAQs & Policy
Briefs**



**Internal
Directories &
Referral
Protocols**



**Process Maps,
Workflows, &
SOPs**



→ Departmental FAQs and Policy Briefs

FAQ sheets and policy briefs act as simple, practical tools to give staff quick access to reliable information. These resources act as easy-reference guides that translate complex policies and procedures into clear, understandable language staff can use. By keeping this information organized and readily available, employees can spend less time searching for answers and more time resolving concerns.

A successful FAQ should be easy to scan and written in plain language. It should include:

- Clear answers to the most common resident questions
- Step-by-step explanations of processes
- Key timelines and deadlines
- Fee schedules and payment options
- Contact information for specialized or escalated issues
- Links or references to detailed policies and forms



→ Internal Directories and Referral Protocols

Internal directories provide a centralized, searchable listing of employees, departments, roles, and contact information. It helps staff quickly identify who to contact for specific issues, services, or expertise, streamlining responses to residents and cross-department coordination.

Directories should be easily accessible via the intranet or shared network and allow searching by name, department, or function. They typically include employee names, titles, departments, phone numbers, emails, and key responsibilities. Advanced directories may list subject-matter experts, backup or after-hours contacts, and organizational charts. Regular updates are essential to keep the information accurate as roles and responsibilities change.

Process Maps, Workflows & SOPs

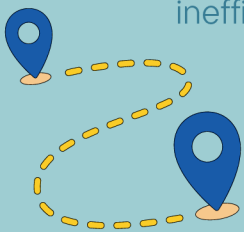
Municipal workflows and standard operating procedures (SOPs) are the step-by-step processes that outline how work moves through an organization and how specific tasks should be completed. Workflows show how requests, permits, inspections, or service issues pass from one employee or department to another, while SOPs provide clear instructions so staff perform those tasks consistently and correctly. Together, they create structure, reduce guesswork, and ensure services are delivered in a predictable and organized way.

Clearly documenting workflows and SOPs is essential for strong customer service.

When staff understand exactly how a process should move forward — who is responsible, what information is needed, and how long each step should take — they can respond to residents more efficiently and with fewer errors.

Documentation also improves consistency, so residents receive the same level of service regardless of who handles their request. It reduces delays caused by confusion, prevents tasks from falling through the cracks, and makes it easier to train new employees.

Just as important, workflows and SOPs should be reviewed periodically to ensure they remain current and effective. Over time, processes can become outdated, or create bottlenecks between departments that slow service delivery. Regular evaluations help identify wasted effort, duplicated tasks, and communication gaps that frustrate both staff and residents. Applying continuous improvement practices, such as those used in Lean Six Sigma, helps municipalities remove inefficiencies and improve coordination across departments.





Common Tools and Methods for Process Mapping and SOPs

Common Process Mapping Methods

- **Swimlane Diagrams** – A type of flowchart that separates responsibilities by department or role, making it easier to see handoffs and potential logjams.
- **Value Stream Mapping** – A detailed method that shows each step in a process along with time, resources, and delays to identify waste and inefficiencies. Often used in Lean Six Sigma initiatives.
- **Service Blueprints** – Useful for customer-facing municipal services. Maps both internal processes and the customer's experience to identify service gaps.
- **Spaghetti Diagrams** – Visual maps showing physical movement of people or materials through a space, helpful for facilities, public works yards, or permit counters.

Facilitation & Analysis Techniques

- **Process mapping workshops** bring cross-department staff together to document real-world workflows
- **Time-in-motion** studies to measure delays and workload distribution
- **Root cause analyses** to identify why bottlenecks occur

Online Tools and Resources for SOP Documentation

- Tools like **Scribe** or **Supademo** are browser-based SOP generators that can automatically capture workflows and turn them into detailed, step-by-step SOPs with screenshots and interactive elements. These and other types of AI-backed programs can make creating consistent SOPs easier to achieve across a department or organization.
- **Creately SOP Generator** provides customizable SOP templates and visual editors to create structured procedures, including collaboration features and export options.

Collaboration & Quality-Control Practices

- Cross-department review sessions to ensure procedures reflect real workflows
- Pilot testing SOPs with frontline staff before final adoption
- Periodic audits and updates to keep procedures accurate as policies and systems change
- Centralized document repositories that ensure staff can easily find current SOPs



3. Training and Development

Training and development for a municipal government refers to the ongoing process of equipping employees with the knowledge, skills, and judgment they need to serve residents effectively and adapt to evolving community needs. It includes everything from technical instruction to leadership growth and customer-service skill building.

Investing in this learning ensures staff is confident, consistent, and responsive, which directly shapes residents' perceptions of their local government. When employees understand both their roles and the expectations for professionalism and empathy, they are better able to resolve issues efficiently and respectfully.



HIRING

Quality customer service starts with quality hiring practices. Recruiting and selecting competent employees ensures that staff have the knowledge, skills, and problem-solving ability to respond effectively to resident needs, manage public resources responsibly, and navigate complex regulations. Equally important is hiring individuals who align with the organization's culture and values—those who are collaborative, empathetic, and committed to public service—because technical skill alone cannot guarantee positive interactions with the community. Key tools and strategies include:

- **Job Analysis and Clear Descriptions:** Defining essential skills, responsibilities, and performance expectations for each role.
- **Structured Interviews:** Using standardized questions and scoring rubrics to evaluate candidates consistently.
- **Behavioral and Situational Assessments:** Gauging how applicants handle real-world scenarios relevant to municipal services.
- **Skills Testing:** Measuring technical or job-specific abilities, such as administrative tasks, software proficiency, or customer interaction skills.
- **Cultural Fit Evaluation:** Assessing alignment with organizational values, teamwork, and commitment to public service.

STRUCTURED ONBOARDING

Onboarding is the structured process of integrating new employees into your organization so they can quickly become effective, compliant, and service-oriented team members. It introduces staff to your mission, public service responsibilities, policies, procedures, organizational structure, and community expectations. Strong onboarding helps employees understand how their role supports service delivery to residents and how departments work together to meet public needs.



Pro Tip!

it's important to recognize the difference between on-boarding and training

TRAINING & CONTINUOUS LEARNING PROGRAMS

Training and continuous learning help employees build and maintain the skills, knowledge, and abilities needed to perform their jobs effectively. Training isn't just about teaching specific tasks or procedures. It also includes continuous learning opportunities that encourage ongoing improvement, adaptability, innovation, and alignment with the city's values and service goals. Together, these efforts ensure staff can deliver high-quality, resident-focused customer service.

Key tools and strategies include:

Dedicated In-House Training Programs

- citywide trainings. Structured learning programs offered to all employees across the organization, often focused on core competencies like customer service, leadership, and communication.
- department trainings. Role-specific training focused on the unique needs and functions of each department.
- online training catalog. An on-demand library of courses employees can access anytime for flexible learning.

Cross-Departmental Exposure

- job shadowing/ride-a-longs. Employees observe others' roles to better understand responsibilities and processes. This is especially helpful for field positions where staff can see service delivery in a real-world setting.
- cross-functional leadership teams. Groups from different departments working together on shared initiatives or challenges.

Professional Organizations

- in-person conferences. Events that provide learning, industry insights, and networking opportunities.
- local trainings. Regional workshops that offer relevant, accessible professional development.
- webinars. Short, virtual trainings focused on specific topics with no travel required. These also offer flexible learning for employees.

Growth Plans & Continuing Education

- growth ladders for positions. Clear pathways showing how employees can advance within a role or department.
- certification pay. Extra compensation for earning and maintaining professional certifications.
- tuition reimbursement. Financial support for job-related education or degree programs.
- mentorships. Guidance from experienced employees to support growth and development.

4. Reporting and Continuous Improvement

Reporting and continuous improvement tools, if used well, can drive accountability and customer service enhancement through data and feedback. For customer service in particular, a customer feedback loop is promoted in the private sector as a key part of improving products and services based on actual user input. The goal is a continuous, four-step process—collecting feedback, analyzing, acting on improvements, and following up with the customer—to retain customers. Although there is less customer choice in the public sector, the best practice of a customer feedback loop still applies! By understanding customer perspectives and needs, city services can foster customer trust in local government.

Here are some suggested tools:



01 Customer Journey Mapping

Follow customer touchpoints across a single process or across city services and look for opportunities to optimize efficiency or customer experience. This could be via undercover audit, process mapping exercise, or customer focus group. AI sentiment analysis is a cutting-edge way to flag issues in real time.



02 Customer Focus Groups

Customer focus groups give local governments a chance to hear directly from residents about what's working and what's not. These conversations help staff better understand real experiences and uncover blind spots. Customer focus groups are also helpful for testing out new processes and products before they are shared with the public.



03 Frequent Customer Surveying

Citywide resident surveys, customer satisfaction surveys for individual services, and in-person walk-up surveys all have a role to play in collecting feedback data to analyze and identify potential improvements for city services. Circulating and publicizing customer testimonials and customer reviews are trending in the private sector and could be used more widely in the public sector.



04 Cross-Departmental Customer Service Committee(s)

A staff work group focused on continuous improvement as it relates to customer service specifically can enhance consistency in customer service. For instance, publicizing turnaround times to set expectations for service delivery.



COMMON TOOLS AND METHODS FOR REPORTING AND CONTINUOUS IMPROVEMENT

Customer Journey Mapping

- **Smaply.** Visualizes end-to-end resident experiences
- **Miro.** Helps teams map workflows and identify pain points
- **Microsoft Visio.** Useful for formal process and service mapping

Customer Focus Groups

- **Remesh.** online platform to conduct large scale focus group; uses AI to help analyze themes and sentiment
- **FocusGroupIt.** web-based tool deign to collect in-depth feedback and flexible participation

Cross-Departmental Committees

- **Mural** or **Miro** are digital collaboration tools designed to help teams interact and solve problems visually.
- **Power BI** or **Tableau** are data visualization tools that help teams connect with data and create interactive reports and dashboards on key metrics

in action

Georgetown, TX: Established “Key Accounts” teams to assist significant commercial customers with cross-departmental processes and questions.

McKinney, TX: Leans on a Development Liaison to assist customers and a “Priority Project Team” to support high-profile and complex projects through the development process.

in action

Fort Worth, TX: Offers an “X Team” for expedited building permits and a walk-in assistance team for comprehensive support across multiple departments.

Henderson, NV: Developed the “P.R.E.M.I.E.R. Customer Service Program” for consistent service standards, training, and performance monitoring.

measuring success

Local government customer service standards may vary across municipalities based on population, services provided, and other factors. There are no industry standard programs such as “Great Places to Work” or Business Intelligence Group’s “Excellence in Customer Service” awards that systematically measure and recognize customer service performance across local government. However, there are measurement tools that can help assess a municipality’s general customer service temperature.

The **Customer Satisfaction Score** can be used to measure how satisfied a customer is with a service interaction or customer experience – often immediately after a service is delivered. For example, you receive an item through a delivery service and immediately get a text message asking how satisfied you are with the delivery experience with a way to rate the service through a rating scale. CSAT is determined by the number of satisfied responses, divided by the total number of responses and multiplied by 100. This approach is an easy tool that can be implemented by local governments via an email link upon completion of a service. It can be built into permitting systems or 311 report-a-concern platforms that already engage a customer. The tool provides immediate feedback and is easy to track.

The **Customer Effort Score** measures how easy or difficult it was for a customer to complete a task or get a resolution on a problem. Typically, the CES is determined by a ranking to one simple question: “*How easy was it to resolve your issue today?*” The average response to the question on a rating scale determines the CES. The higher the score, the less effort it takes for a customer to get an issue resolved. This tool may be a challenge when implemented in the public sector as many of the issues that need resolution can be nuanced or complex in nature. However, it is a useful tool when determining high-level interactions. For example, a CES may be used to determine if an application or system, not necessarily the overall service issue, is effective, efficient, and does not make the customer service experience worse.

The **Net Promoter Score** (NPS) was developed in 2003 by Bain and Company and is a standard tool to assess customer experience. NPS measures customer loyalty and satisfaction based on a single question: “*How likely is it that you would recommend this company/service/product to a friend?*” Respondents then provide a score from 0-10 with the top scores (9 and 10s) referred to as promoters and bottom scores (0-6) called detractors. Scores between 7 and 8 are passive. The total score is calculated as the percentage of scores who are promoters minus the percentage of scores who are detractors. Passive scores aren’t directly included in the NPS but are counted in the total number of respondents. Thus, reducing the proportion of Promoters and Detractors and pushing the NPS towards zero. NPS is a consistent tool that can provide helpful insights on identifying which services are effective and which services need improvement.

The **National Community Survey** administered through Polco, and the ETC Institute's community and organizational surveys offer third-party options for assessing overall customer satisfaction and perception of government services. However, they do not necessarily focus exclusively on customer service unless specifically tailored to do so. ETC Institute goes a step further by acknowledging where their clients show to provide exceptional customer service through their "Leading the Way" award, which is given to cities and counties that rank within the top 10% of communities based on their performance in three areas: 1. Satisfaction with the overall quality of experience; 2. Satisfaction with customer service provided by employees; and 3. Satisfaction with the value residents feel they receive for local taxes and fees. It is important to note that this distinction is provided to communities who are clients of the ETC Institute and have used their survey product, DirectionFinder®, as the basis for determining such levels of service and criteria have been met.

Ultimately, the customer service experience in a municipality is going to be determined by a combination of several factors, including accessibility, response time, resolution tracking, and overall customer satisfaction with the resolution, which is a qualitative measure. Establishing a clear set of Service Level Agreements (SLAs) to determine the standard for an organization is critical. Further, ensuring that there is a tool or method to measure SLAs through Key Performance Indicators (KPIs) is necessary when assessing customer service. The SLAs and KPIs create structures for employees, and the data collected determines how to adjust the organizational management approach to customer service. While there is no one "gold standard" for local government customer service, organizations that use a combination of survey tools to gather feedback, SLAs and other metrics in place to help guide employees, and systems to track and understand the customer experience will be able to make data driven decisions to improve and enhance services and ensure a more transparent and accountable government operation.



ADDITIONAL RESOURCES:

- Sample Citizen Service Charter
 - Sample Escalation Matrix
 - Sample Tone and Language Guidelines
- 

Sample: Citizen Service Charter

Our Commitment to You

Our municipality is committed to providing high-quality, transparent, equitable, and responsive services to all residents, businesses, and visitors. This Citizen Service Charter outlines the standards you can expect from us, how we will deliver services, and how you can help us serve you better.

Alignment with ICMA Principles

This Citizen Service Charter is aligned with the International City/County Management Association (ICMA) practices and ethics, including a commitment to: - Professional Management grounded in integrity, competence, and public trust - Equity and Inclusion in service delivery and decision-making - Transparency and Open Government - Responsiveness to Community Needs - Stewardship of Public Resources - Continuous Organizational Improvement

Our Values

We are guided by the following principles, consistent with ICMA best practices: - **Service Excellence** – Delivering reliable, professional, and timely services - **Equity & Accessibility** – Serving all people fairly and inclusively - **Transparency & Accountability** – Communicating clearly and owning our outcomes - **Integrity & Respect** – Treating everyone with dignity and courtesy - **Stewardship** – Using public resources responsibly - **Continuous Improvement** – Learning, adapting, and improving our services

Service Standards You Can Expect

We commit to the following service standards across all municipal departments:

Communication

- Clear, accurate, and timely information
- Plain-language explanations of policies and processes
- Advance notice of service disruptions when possible

Responsiveness

- Acknowledgement of inquiries within 2 business days
- Resolution or status update within 5–10 business days, depending on complexity
- Emergency issues addressed immediately or as soon as safely possible

Professional Conduct

- Courteous, knowledgeable, and respectful staff
- Identification provided by staff upon request
- Consistent application of laws, ordinances, and policies

Accessibility

- Compliance with the Americans with Disabilities Act (ADA)
- Multiple ways to access services (online, phone, in person)
- Language assistance when reasonably available

Key Service Areas

While specific timelines may vary, we strive to meet or exceed the following expectations:

- Public Safety – Prompt emergency response and proactive community engagement
- Public Works & Infrastructure – Safe, well-maintained streets, utilities, and facilities
- Parks & Recreation – Clean, welcoming spaces and inclusive programming
- Planning & Development – Fair, predictable, and transparent review processes
- Customer Service – Easy-to-navigate services and clear points of contact

Department-specific service standards may be published separately.

Your Role as a Community Member

You can help us serve the community effectively by: - Providing accurate and complete information - Treating municipal staff and other community members with respect - Following local laws, rules, and posted guidance - Reporting issues promptly through designated channels

Feedback, Complaints, and Compliments

We welcome your feedback—it helps us improve.

Compliments help us recognize great service

Concerns or Complaints are reviewed fairly and promptly

You can submit feedback:

Online via the municipal website

By phone or email

In person at City Hall or designated facilities

We aim to acknowledge complaints within 2 business days and provide a response or resolution within 10 business days, when feasible.

Accountability & Continuous Improvement

Consistent with ICMA practices, we will: - Establish and monitor performance measures for key services - Use data, benchmarking, and community feedback to drive improvements - Train staff in customer service, equity, and ethical governance - Foster a culture of learning, innovation, and professional development - Report progress publicly when appropriate

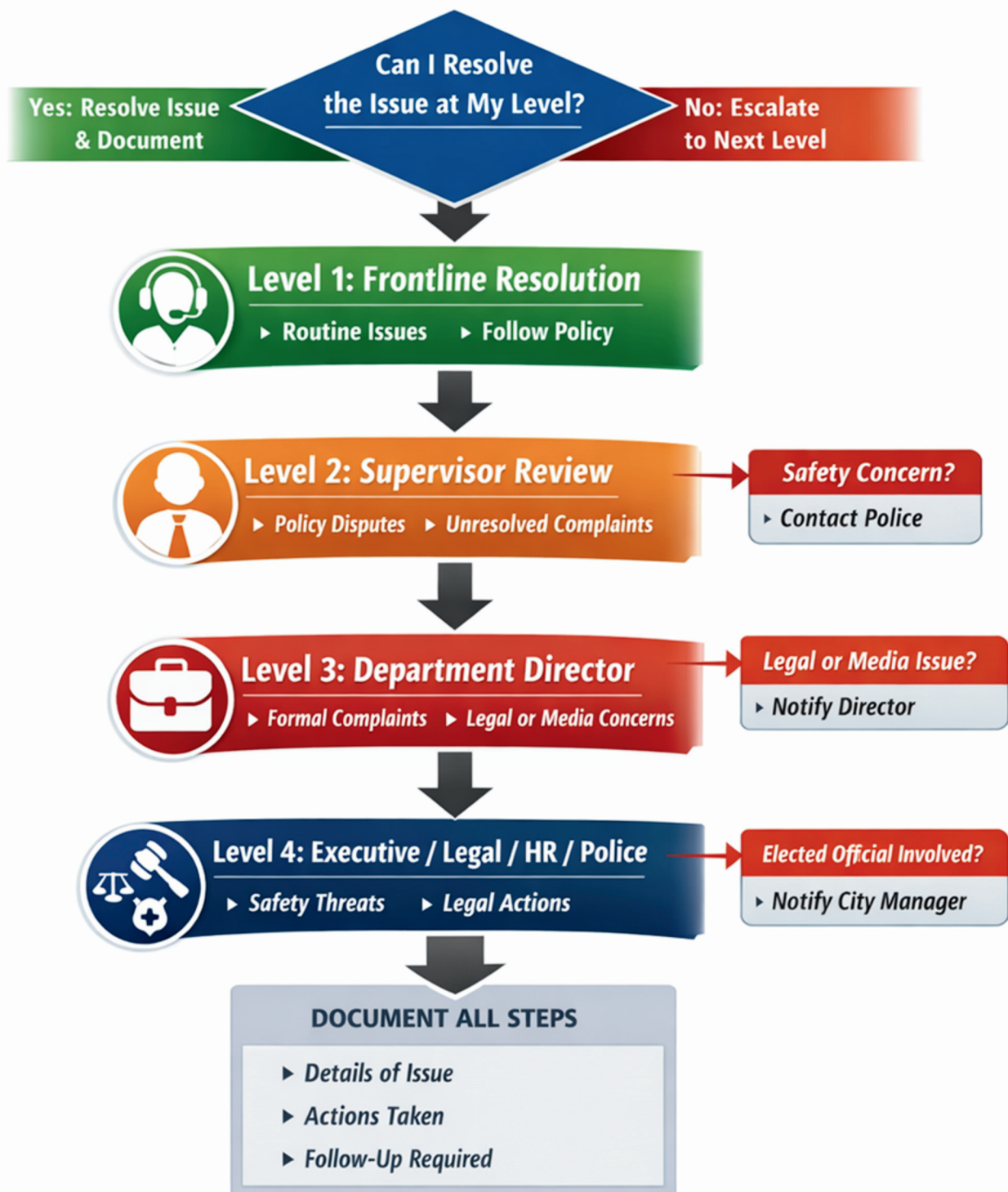
Our Promise

This Citizen Service Charter represents our promise to serve the community with professionalism, care, and integrity—today and into the future.

Adopted by the [City/Town/Village] of _____ on _____.

Sample: Escalation Matrix

Municipal Customer Service Escalation Matrix



Sample: Tone and Language Guidelines

OUR SERVICE STANDARD

Every interaction should reflect:

Professionalism • Empathy • Clarity • Neutrality • Accountability

You represent the entire organization in every conversation.

1. Start with Professionalism

- Greet courteously
- Use the customer's name when appropriate
- Maintain calm tone and steady pace
- Thank them for contacting the City

Say:

"Thank you for reaching out."

"How can I assist you today?"

"I'm happy to help."

2. Lead with Empathy

Acknowledge before explaining.

Say:

"I understand how that could be frustrating."

"Thank you for bringing this to our attention."

"Let's look at what options are available."

Avoid dismissive phrases like:

"That's just the rule."

"There's nothing we can do."

"Calm down."

3. Use Clear, Plain Language

- Avoid jargon and acronyms
- Break information into steps
- Provide timelines
- Confirm understanding

Instead of: *"Your request is pending administrative review."*

Say: *"Your request is being reviewed. You can expect an update within five business days."*

4. Stay Neutral and Policy-Based

You are not the policy — you are the guide.

Say:

“City policy requires...”

“Our ordinance states...”

“The process involves the following steps...”

Avoid personal opinions or political commentary.

5. Take Ownership

Even if it's not your department, help move it forward.

Instead of: *“That's not my department.”*

Say: *“I'll connect you with the right person.”*

Instead of: *“You need to call them.”*

Say: *“I'll provide their contact information and let them know you'll be reaching out.”*

When Situations Are Challenging

If a customer is upset:

- Lower your voice
- Do not interrupt
- Set respectful boundaries if needed

Example: *“I want to help resolve this. Let's keep the conversation respectful so we can move forward.”*

If delivering unfavorable news:

- Be direct and compassionate
- Explain why
- Provide next steps

Example: *“The permit cannot be approved today because the inspection hasn't occurred. Once completed, we can move forward.”*

If you don't know the answer:

Never guess. *“I want to make sure I provide accurate information. I will follow up with you by tomorrow at 3 p.m.”*

Always close with:

- Summary of next steps
- Timeline
- Courteous closing

Example: *“Your service request has been submitted and you will receive confirmation within one business day. Please contact me if you need anything further. Thank you.”*

