



Call 311:

Connecting Citizens to
Local Government

Leading Practices Report

Recommended Practices for 311/CRM Data Reporting

ICMA

Leaders at the Core of Better Communities

 **311**
SYNERGY GROUP

 Association of Government
Contact Center Employees
AGCCE

About This Project

As a project of the ICMA National Study of 311 and Customer Service Technology, ICMA, the 311 Synergy Group, and the Association of Government Contact Center Employees (AGCCE) have produced this list of recommended practices for 311/CRM data reports. These recommendations are based on an analysis of thirty-seven reports received from jurisdictions throughout the United States and Canada. This list of recommended practices provides guidance to 311 directors and managers on generating reports for citizens, elected officials, and department managers as well as for their own internal purposes. Samples

of actual 311/CRM data reports can be found on ICMA's website at http://icma.org/en/icma/knowledge_network/topics/topic/1#Tab=Documents.

For more information on this report or the ICMA National Study of 311 and Customer Service Technology, contact:

Cory Fleming, project director

Phone: 207-854-1083

E-mail: cflaming@icma.org



ICMA advances professional local government worldwide. Its mission is to create excellence in local governance by developing and advancing professional management of local government. ICMA, the International City/County Management Association, provides member support; publications, data, and information; peer and results-oriented assistance; and training and professional development to more than 9,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect 185 million individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

Copyright © 2011 by the International City/County Management Association, 777 North Capitol Street, N.E., Suite 500, Washington, D.C. 20002. All rights reserved, including rights of reproduction and use in any form or by any means, including the making of copies by any photographic process or by any electronic or mechanical device, printed or written or oral, or recording for sound or visual reproduction, or for use in any knowledge or retrieval system or device, unless permission in writing is obtained from the copyright owner.

Project Advisory Committee

Lisa Allen, Director, 311 Operations, Baltimore, MD

Kate Bender, Management Analyst, 3-1-1 Action Center, Office of the City Manager, City of Kansas City, MO

Dee Crayton, Operations Manager, CharMeck 311, NC and Chair, AGCCE

Marilyn Givan, Manager, MetroCall 311, Louisville, KY

Elizabeth Henley, 311 Call Center Coordinator, City of Chattanooga, TN

Gina E. Knepp, 311 Division Manager, City of Sacramento, CA

Jean Ann Lawson, 3-1-1 Operations Manager, 3-1-1 Action Center, Office of the City Manager, City of Kansas City, MO

Eva Liggins, Assistant Director, Dallas 311, Office of Strategic Customer Services, City of Dallas, TX and Chairperson, 311 Synergy Group

Rose Minton, Staff Support, 311 Synergy Group and Independent Consultant, Heights Consulting

DJ Russell, Information Manager, 311 Customer Call Center, City of Hampton, VA

Carlton Viar, Workforce Manager, CharMeck 311, NC

Ingrid Scott Weekley, Managing Director, Administrative Services, City of Grand Rapids, MI

Stephanie Weaver, Tax Collector/Deputy Treasurer, City of Saco, ME

Recommended Practices for 311/CRM Data Reporting

Background

One of the benefits associated with a centralized customer service system, such as a 311 call center or a constituent relationship management (CRM) system, is the wealth of new data available for measuring performance and reviewing budgetary requirements. How and to whom these data are reported is the subject of this project. The project advisory committee reviewed 311/CRM data reports received from thirty-seven jurisdictions throughout the United States and Canada. Fifteen of the jurisdictions operated a CRM system, either as an online system or using a dedicated seven-digit phone number for their call center. Twenty-two of the jurisdictions maintained a 311/CRM system. The populations of the jurisdictions ranged from Fishers, Indiana (population nearly 62,000) to New York City, New York (population approximately 8.3 million). A complete list of the jurisdictions submitting reports for this project is found on the final page.

In developing these recommendations, committee members analyzed the current reporting practices used by the jurisdictions (see Table 1) including the focus of the reports, the report elements, and intended audience of the reports.

Recommendations for reporting on the performance of the 311/CRM contact center and/or the online service request system

Defining terminology

1. One of the primary goals of 311/CRM systems is first/one call resolution for the citizen, so that transfers or repeat phone calls from the citizen are not needed. Capturing data on this issue is problematic because the definition of these terms is not easily understood or universal. For example, should all calls for information be classified as

first/one call resolution? Should calls for service request be classified as first/one call resolution even though the actual work may take place in the future? Jurisdictions need to develop clear definitions for what constitutes an information call, a service request call, and first/one call resolution before tracking the volume of types of calls.

Determining audiences

2. Key 311/CRM system data that should be reported to all stakeholder groups, such as local government management and service departments, elected officials, and citizens, include: total number of calls and/or contacts handled; average wait/hold time for the caller to reach an agent; and abandoned call rates when the caller hangs up before reaching an agent.

Content and format

3. Reports should also include data on the means used (i.e., phone calls, faxes, e-mails, letters, and walk-ins) to contact the 311/CRM system. Reports from larger jurisdictions (over 100,000 in population) often included self-service web applications and other alternatives such as Smartphone applications.
4. Always include the jurisdiction's name, brand, or logo on reports, especially if they are made available on a public website.
5. Less is more. Too much information creates overload. Visually, reports need to be simple and easily understood by the layperson.
6. Using graphs and charts is helpful for understanding the context of 311/CRM data.
7. Do not use acronyms in reports or, if necessary for space purposes, include a report key that spells out the full name behind the acronym.
8. The length of talk time on calls should be tracked for reviewing a call agent's performance, but the

4 Recommended Practices for 311/CRM Data Reports

quality of the call (for example, was the agent able to answer the citizen's concerns?) is more important than establishing an artificial goal for the desired length of a call.

9. Not all data generated by a telephony system should be reported to the local government leadership or public. Confidential information such as contacts made regarding court cases or sensitive health information also should not be reported. Contact center directors and managers need to review and sort through available data to determine what types of data are relevant to most citizens.

Schedules for reporting

10. Regular reporting to measure changes in the volume and types of contacts made over time is critical. These types of trending data on use of the 311/CRM system should be made available on the jurisdiction's website for citizens and local government leadership to review.
11. 311/CRM contact center managers and directors need to review daily reports, such as call volume, agent performance, average handle times, average wait time, and abandoned calls, for management and operations purposes.
12. Local government leadership and the greater community should be provided with monthly reports that summarize the volume and nature of calls being received and the number of service requests open and closed. The monthly reports offer not only greater accountability for service delivery on the part of the local government to its residents, but also will help identify trends over time.
13. For smaller online request systems that do not receive a great volume of contacts from the public, reports can be generated on a quarterly basis to track trends.

Table 1. Summary of 311/CRM Data Reporting Practice

Focus of the Report	# of Jurisdictions Including This Info in 311/CRM Data Reports (Total=37 jurisdictions)
Workload (Number of Opened/Closed Requests)	23
Call Center Performance Metrics	18
Timeframe to Complete (Average)	11
Timeframe (% of Time Department Meets Goal)	11
Status of Actions/Requests	11
Citizen Survey Results (Sent out by 311/CRM)	10
Productivity of Staff	8
Human Resource (HR)/Personnel Performance	6
Budget/Revenue Numbers	4
Source/Use of Self-service	3
Status of Internal Improvement Efforts	2
Report Elements	
Visual Presentation (Use of Graphs or Charts)	24
Breakout by Service Departments	24
Breakout by Issue Areas	22
Breakout by Time Period (Monthly, Quarterly, etc.)	19
"Top X" List	14
Written Summary	9
Report Key	7
Breakout by Geography (Neighborhood, District, Ward, etc.)	6
Organizational or Process Flow Chart	3
Screenshots of CRM System	3
Breakout by External and Internal Issues	3
Table of Raw Data	3
Communications Plan	0
Focus on a Single Issue Area or Service Department	0
Audience	
Elected Officials/City Manager	25
Internal/Quality Assurance and Continuous Improvement	19
Service Departments	19
Citizens	15

Source: ICMA National Study of 311 and Customer Service Technology.

Recommendations for reporting on the performance of service departments with 311/CRM data

Setting the context

- 311/CRM data related to the performance of local government service departments needs to be presented in a meaningful way. While the volume of service requests or the timeframe to complete service requests is important, the data should be set in context and compared with the department's service goals or its estimated response times (ERTs)—i.e., when the department will respond to the request—and service level agreements (SLAs)—i.e., when the work on the service request will be completed.
- Provide a note of clarification on what's being reported. For example, 50 calls for potholes in a month do not mean that there are 50 potholes that need to be filled, but rather that the contact center received 50 calls about potholes.

- Many 311/CRM data reports include information on the length of time it takes to close a service request. Often reports will include the average time taken to close service requests. However, reporting on median time taken shows a truer picture of work flow in a service department since it provides a snapshot of how the department is responding most of the time.

Report features to increase understanding

- Many larger jurisdictions (population over 100,000) used “Top 10” lists. When broken down by districts or wards, this information is particularly helpful for identifying “hot spots” in neighborhoods.
- Monthly reports should be prepared for local government management and service departments in order to track trends. Consistent use of the same report format is critical for helping service departments learn to understand and use system data in their operations.

Figure 1. An example of an in-house report used by call center directors and managers (Recommendation 11).

Chattanooga ACD Statistics for 1/2/2011 - 1/8/2011, Call Analysis by Hour

Hour of Day	Incoming Calls		Answered Calls		Maximum Answer Delay	Answer After Threshold (30 sec)		Answer After 1 Minute		Abandoned Calls	Dropped Calls		Nbr of Agents
	Total	Avg.	Total	Avg.	hh:mm:ss	Total	%*	Total	%*	Total	Total	%*	Daily Avg.
8:00-8:59:59 AM	446	89	378	76	0:07:20	111	25.6%	71	16.4%	13	36	8.3%	5
9:00-9:59:59 AM	488	98	433	87	0:05:35	128	27.3%	93	19.8%	19	31	6.6%	8
10:00-10:59:59 AM	539	108	489	98	0:03:35	151	29.2%	100	19.3%	22	41	7.9%	8
11:00-11:59:59 AM	537	107	495	99	0:05:16	100	19.0%	55	10.5%	12	27	5.1%	8
12:00-12:59:59 PM	517	103	380	76	0:06:15	178	36.8%	125	25.8%	33	101	20.9%	5
1:00-1:59:59 PM	447	89	375	75	0:04:49	121	28.6%	82	19.4%	24	48	11.3%	6
2:00-2:59:59 PM	469	94	414	83	0:03:46	106	23.9%	57	12.8%	25	37	8.3%	6
3:00-3:59:59 PM	497	99	413	83	0:05:16	161	33.8%	113	23.7%	21	62	13.0%	7
4:00-4:59:59 PM	376	75	299	60	0:05:07	94	27.4%	63	18.4%	33	44	12.8%	5
5:00-5:59:59 PM	150	30	85	17	0:04:54	34	25.2%	24	17.8%	15	35	25.9%	2
Totals	4466		3761		0:51:53	1184		783		217	462		

Nbr of Agents: Daily Avg. is calculated as an average of the number of agents logged on for each day in report period. It is an average of the values on the Number of Agents Logged On chart on the Calls Per Agent sheet.

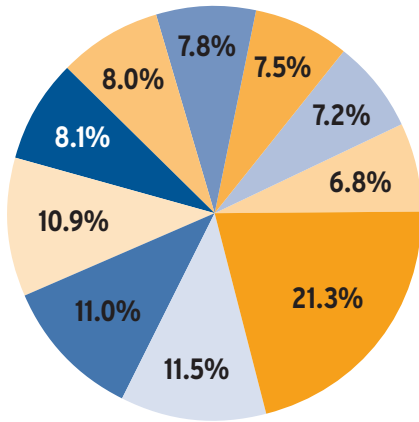
Abandoned calls: Abandoned before threshold (30 seconds)

Dropped Calls: Abandoned after threshold (30 seconds)

***Note:** % of Dropped / Answered After Threshold Calls does not include calls abandoned before threshold (30 seconds).

Source: Chattanooga 311 Call Center, Chattanooga, Tennessee

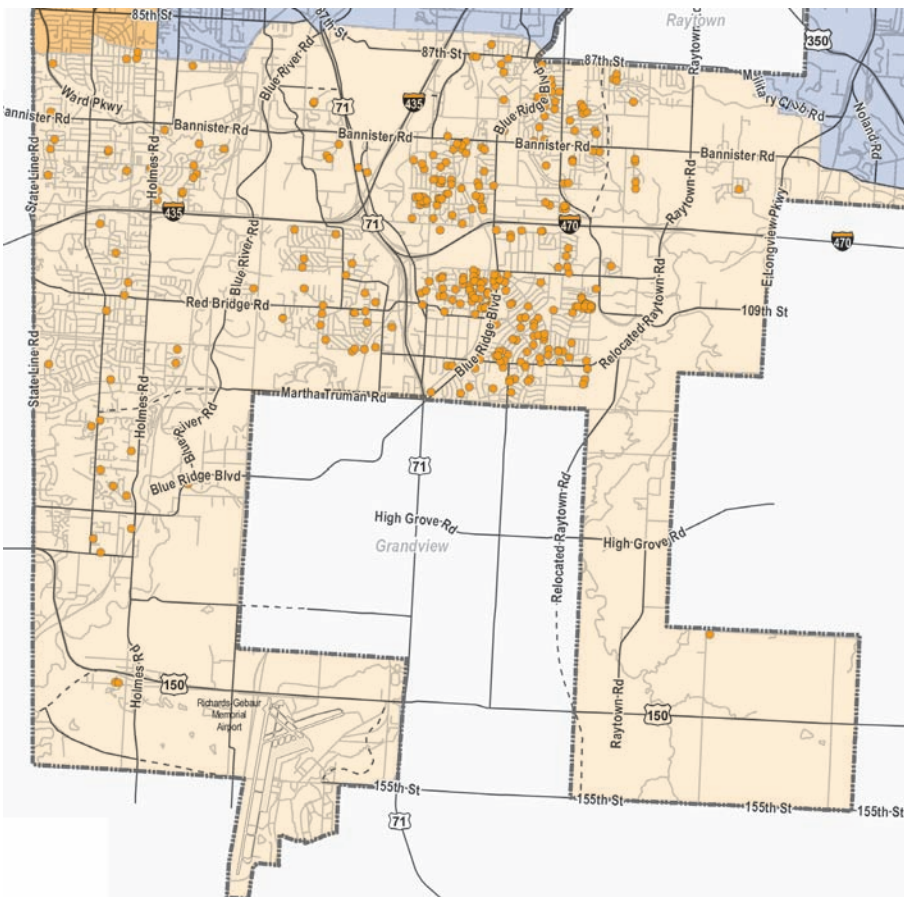
Figure 2. An example of a Top Ten List (Recommendation 17).
Dallas Top 10 Services



SR Type Service	Request Count
High Weeds-CCS	7,393
Litter-CCS	3,998
Dead Animal Pick Up-SAN	3,824
Roll Cart-SAN	3,789
Animal-Confined-CCS	2,818
Animal-Loose Aggressive-CCS	2,767
Obstruction Alley/Sidewalk/Street- CCS	2,717
Signs-Public Right of Way-CCS	2,604
Garbage-Missed-SAN	2,488
Recycling ROLL CART Registration-SAN	2,359

Source: Dallas 311, Office of Strategic Customer Services, Dallas, Texas

Figure 3. An example of integrating 311/CRM data with GIS (Recommendation 22).
City of Kansas City, Missouri Council District 6 Property Violations, May-August 2000



- Resolved Property Violations May-August 2010
- Council District 4
- Council District 5
- Council District 6
- City Limit

While the City of Kansas City, Missouri makes every effort to maintain and distribute accurate information, no warranties and/or representations of any kind are made regarding information, data or services provided. In no event shall the City of Kansas City, MO, be liable in any way to the users of this data. Users of this data shall hold the City of Kansas City, MO, harmless in all matters and accounts arising from the use and/or accuracy of this data.

Prepared by: City of Kansas City, Missouri Information Technology Department/GIS Division

Source: Kansas City 3-1-1 Action Center, Kansas City, Missouri.

Recommendations for integrating CRM data with other performance measurement data

Scope of responsibility

19. Contact centers improve the local government customer service experience, but are not directly responsible for improved service delivery. If customer satisfaction surveys are used to access call center performance, this distinction is important. Surveys should differentiate between customer service and service delivery. For example questions like “How satisfied were you with the customer service you received from the call agent” address customer service, while “How satisfied were you with the work performed?” focuses on service delivery.
20. When integrating 311/CRM data with other performance measurement data for local government service departments, explain the difference between ERTs and SLAs when reporting on the status of service requests. (See Recommendation 14 on providing context for 311/CRM data.)

Using data effectively

21. Service department executives and managers should be encouraged to review 311/CRM data across departmental service lines to better understand trends that may be impacting the jurisdiction and collaborate on intervention work in “hot spots.”
22. Greater use of geographic information systems (GIS) in combination with 311/CRM data allows elected officials as well as managers and service department executives to understand what is happening in neighborhoods, wards, and/or districts throughout the community.
23. When 311/CRM data are tied to local government performance measurement and budgeting efforts, the combined information helps local government leadership understand citizen demand for services and provides documentation in the allocation of jurisdictional resources (funding, staffing, etc.).
24. Integrating 311/CRM data with human resource (HR) data can help monitor the individual performance of call agents (see Recommendation 8 regarding monitoring the length of talk time as part of a call agent’s performance), as well as personnel in service departments.
25. For joint 311/CRM and utilities call centers, finding a way to report on the utilities’ performance, even

if the data are collected on a separate software system, can provide useful information. Utilities’ data, such as statistics for on-time billing, billing accuracy, etc., need to be reported to citizens, as well as to local government leadership.

Appendix. Jurisdictions Submitting 311/CRM Data Reports

City/County	State	Population	Type
Town of Fischers	IN	61,840	CRM
Lynwood	CA	71,061	CRM
Somerville	MA	74,405	311
Shaumburg	IL	75,936	CRM
Sandy Springs	GA	82,674	CRM
Clovis	CA	95,128	CRM
Columbia County	GA	108,276	311
Hartford	CT	117,715	311
Carrollton	TX	123,799	CRM
Hampton	VA	146,154	311
Springfield	MA	149,586	311
Chattanooga	TN	160,592	311
Baldwin County	AL	171,447	CRM
Knoxville	TN	177,646	311
Columbus	GA	188,456	CRM
Little Rock	AR	188,704	311
Richmond	VA	200,158	311
North Hempstead	NY	222,611	CRM
Henderson	NV	240,614	CRM
Greensboro	NC	244,092	CRM
Fort Wayne	IN	248,115	CRM
Pittsburgh	PA	295,988	311
Corpus Christi	TX	297,413	CRM
Durham	NC	308,962	CRM
Minneapolis	MN	358,896	311
Kansas City	MO	482,299	311
Albuquerque	NM	507,823	311
Las Vegas	NV	558,383	CRM
Vancouver	BC	578,041	311
Denver	CO	584,563	311
Columbus	OH	729,369	311
Austin	TX	746,835	311
Dallas	TX	1,214,287	311
Houston	TX	2,024,379	311
Miami-Dade County	FL	2,385,876	311
Los Angeles	CA	3,749,058	311
New York	NY	8,308,163	311

ICMA National Study of 311 and Customer Service Technology

In 2006, the International City/County Management Association (ICMA) received funding from the Alfred P. Sloan Foundation to conduct the first national study of centralized customer service systems for local governments, such as 311 call centers, constituent relationship management (CRM) systems, and online service request forms, among others. Working with The Ochs Center for Metropolitan Studies in phase two of the study, ICMA is conducting research and developing new resources and tools for communities considering implementation of 311/CRM systems.

For more information about the study, contact...

Cory Fleming, project director

Phone: 207-854-1083

E-mail: cfleming@icma.org



777 North Capitol Street, NE
Suite 500
Washington, DC 20002-4201

The mission of ICMA is to create excellence in local governance by developing and fostering professional local government management worldwide.