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Alliance for Innovation
TLG 2014 Case Study Application
8/2/2013 deadline

City of Charlotte - CharMeck 311 - You Can't Manage What You Don't Measure

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10101 Claude Freeman Drive
Charlotte, NC 28262
United States

Additional Contacts
mmaliszewski@charlottenc.gov

mmaliszewski@charlottenc.gov
Tel: 704-432-2847

Application Questions

1 Please list your jurisdiction's population.

750,000+ City of Charlotte; 950,000 Mecklenburg County

2 Please list which case study category you would like this application to be considered for.

- Organizational Wellness
- Technology Advancements
- Communications
- Performance Excellence

3 Would you like the application to be considered for an Innovation Award?

(eligible to Alliance member jurisdictions only)

- Yes
- No

4 Would you like the application to be considered for our Rapid Fire Session?

- Yes
- No

5 What is the intent of the project/program/service?

CharMeck 311 utilizes data to make process improvements and increase efficiency internally and across multiple governmental agencies both for the city and county. Our main goal is to find ways to enhance services to the community and increase accessibility. Primary drivers for this effort were to reduce expenditures, particularly overtime, increase agent productivity, accelerate cross-training efforts and ultimately further enhance the level of service delivered to citizens and partners.

6 What are the costs, if any?

N/A, these objectives are core responsibilities of the Leadership team.

7 What are the savings, if any?

Enhanced focus was placed on using data to eliminate performance gaps and increase productivity. One major accomplishment and significant improvement occurred in the area of efficiency. Workforce management and resource utilization is at the mercy of incoming calls and staffing. This involves daily forecasting of call volume and staff calculations to manage service levels. There are many factors that contribute to maximizing productivity, but the main components are attendance and availability. In an effort to increase morale and provide training a significant amount of time was depleted for activities other than answering phones. This resulted in lost hours of productive time and more importantly lost opportunities to assist customers. To increase productivity without compromising training and morale new techniques were used to achieve this mission, with an emphasis on managing After Call Work (ACW) status and close scrutiny of off phone activities. The reduction in non-productive time and the gain of 23,000 hours over two years placed CharMeck 311 in a positive position to re-allocate resources for cross-training current Customer Service Representatives (CSR's) instead of hiring new employees. This facilitated improvements in customer service by decreased hold time, improved speed of answer, minimized transfers, and increased agent availability. The vacant positions and reduced overtime produced savings of over \$2 million dollars.

8 What are the innovative characteristics and explain how they improved the organization.

To foster teamwork and pride within CharMeck 311, clear expectations are set regarding our mission, core business and how the organization is measured by the public and other entities. This required emphasizing the concept of "You Can't Manage what you Don't Measure". Daily performance metrics and data mining results are disseminated to the entire staff and are a major component of the organization's strategy to show how each individual's performance contributes to the success of the team. Regularly reviewed is how data assists in decision making with hiring, training, staffing, scheduling, strategic planning, effectiveness, motivation and mapping growth. Most organizational decisions have the biggest impact on the front line and their buy-in and understanding of how these decisions are made is essential for continual success. This inclusion, shared knowledge and communication has served as motivation and created a sense of ownership. It also generated more trust in the decision making process, allowing for easier and swifter transitions in realignments and changes. This process also emphasizes CharMeck 311's alignment with the City of Charlotte's Strategic Principle of "Comprehensive Citizen Service" and Corporate Scorecard objectives to "Serve the Customer", "Run the Business", "Manage Resources, and "Develop Employees"

9 Please tell us about the obstacles you encountered when creating and/or implementing this program, if any.

While any change effecting employee performance measurement is accompanied by some degree of skepticism, the manner in which it was communicated allayed those concerns. Employees were initially very concerned about the changes proposed, with some thinking the organization only cared about performance metrics or the "numbers". There was also some doubts about the decision to not hire new training classes and what impact that would have on our service delivery, and would it return the center to long wait times, high number of citizen calls in queue and a constant state of "all hands on deck" to try and service citizens.

10 What were the outcomes – cost savings, for citizens, any performance measures information, etc.?

In addition to the \$2 M savings noted above, data is also used to communicate to our internal partner departments. CharMeck 311's Partner Liaison team is responsible for business processes and partner collaboration across departments. They host monthly meetings with the department key stake holders. The monthly meetings serve as a forum to review CharMeck 311's performance and departmental service resolution data. An Executive Summary is provided for each department complete with comparative analysis of month-over-month and year-over-year data. It provides trends in call drivers, improvements and areas of opportunities. The data provides analysis on normal call volume and new programs.

While there were significant cost savings, the other big element saved is time. While maintaining excellent service delivery, the center made the strategic decision to invest in our employees by accelerating CSR cross training efforts. Service is divided into 3 areas or skills, and after approximately 6 to 9 months, a CSR is cross trained into a second skill. Within 18 months the goal is to have CSR's acquire their third skill and able to handle all inquiry types. This is a dramatic increase from previous timelines, further increases CSR availability to citizens, and provides the employee opportunity for increased compensation when acquiring the 3rd skill. Being fully cross-trained also increase promotional opportunities in the center and with other city and county departments.

11 What are the applicable results and real world practicality?

This data has served to increase efficiency and make adjustments in service procedures or policies with many city and county departments. CharMeck 311 has met or exceeded all performance goals for 29 consecutive months. Focus is continual on exploring ways to improve citizen service and look for additional channels to provide citizens access to their city and county government.

City and County Partner departments have come to expect data on not only how many contacts citizens make to 311, but why they call. This leads to discussions on how to improve the process and customer experience, and discuss whether citizens should need to call to get this service or information.

From an employee perspective, one very important outcome of this effort hits close to home. Like many local governments in recent years, the City of Charlotte has been impacted by the downturn in the economy, and one of the implications to employees was a freezing or merit increase in the previous two fiscal years. As a result of the productivity and efficiency gains, CharMeck 311 was able to re-invest part of those savings and make adjustments to bring many employees up to the market rate for their positions. Also, as the service delivery and expectations evolved over the last 8 years, the center was able to adapt by reclassifying open, unfilled positions into positions more relevant to the current and future department need, such as data mining, database analyst and communication specialists

12 Was a private consultant used?

If yes, describe their involvement; and identify the consultant and/or firm, including contact information. If no, enter N/A.

No

13 Briefly describe what your case study presentation might include.

We want to know how you will make your session creative and unique.

Presentation would include a brief PowerPoint presentation with general overview of 311 operations and CharMeck 311 performance. Charts and graphs detailing the increase in performance, efficiency and maintenance of high quality and customer satisfaction results are included.

A group discussion would consist of a discussion of the opportunities and challenges and would incorporate how to use data to improve the process for citizens, partners and employees. The heart of the discussion and what would likely generate great group interaction would be by asking the group "Why do citizens contact you, and do you want them to?" While this generally raises some eyebrows and answers of "Of course, that's why we are here", when you drill down into the "why" of that question, the discussion gravitates towards inquiries that are problems (missed delivery dates, incorrect bills, miscommunication, etc.) and discussions around different service channels because citizens didn't want to call but they had no other vehicle to get the information or request the service. The focus would be to try to migrate the thinking from being a reactive organization to one that proactively anticipates the needs of the customer and provides innovative ways to meet those needs.

14 Please enter your City/County Manager name and contact information.

Ron Carlee;
rcarlee@charlottenc.gov
704-336-2241

Documents

Documents Requested *

Required? Attached Documents *

Program Synopsis - see instructions above



Supporting Documents - additional files, such as videos, reports, etc. that you think would be helpful to the selection committee in reviewing your application.



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