TLG and LMC 2016 Case Study Application

Future Ready Communities

DUE: September 4, 2015

Email to: Ryan Spillers at rspillers@transformgov.org

COVER PAGE

1.   Case Study Title: A Bird? A Plane? It's HR Connect!

2.   Case Study Category (Select only one, selection identified by highlighting your choice):

Planning for Your Future   Creating an Inclusive Community

Reinventing Local Government   Community Networks

Blinders

3.   Jurisdiction Name: City of Durham, NC

4.   Jurisdiction Population (US Census): 251,893 (2014)

5.   Would you like the application to be considered for our Rapid Fire Session? (Rapid Fire presentations are fast-paced, entertaining, interactive presentations. Each jurisdiction will have five minutes to make their presentations using 15 PPT slides set on auto-forward primarily containing photos/graphics. Participants will be seated at round tables to facilitate an energetic idea exchange. A cash bar will be available.)

YES   NO

6.   Project Leader (Primary Contact for case study notification):
Name: John J. (JJ) Scott
Title: Assistant Human Resources Director
Department: Human Resources
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Twitter Account:

List additional presenters contact information below:

Regina Youngblood, Human Resources Director
Regina.Youngblood@DurhamNC.Gov

Andrew Bullard, Customer Service Supervisor
Andrew.Bullard@DurhamNC.Gov

1.   Presentation title and description of the innovation. *100 word maximum.*

Is It A Bird? A Plane? It's HR Connect!

HR Connect is the City of Durham Human Resources Department's customer service team. We aim to delight and amaze our customers as we assist with all their HR needs. We try to resolve each call, walk-in, or email with the first contact, but if we can't, cases are tracked and deadlines assigned so that customers get their answers quickly. HR Connect gives customers timely, accurate, and consistent information. Our team members are thoroughly trained and highly motivated to provide service so good, you might think they have superpowers.

2.   When and how was the program, policy or initiative originally conceived in your jurisdiction? *100 word maximum.*

Regina Youngblood became HR Director in January, 2014. She reviewed past surveys and reports to identify City employees' top HR concerns. Discussions with every City Director confirmed: Customer service was a huge issue, including the consistency of information (different HR staff providing different answers), timeliness of responses from HR, and customer confusion over which staff handled issues. The idea for HR Connect, a centralized customer service center with the power to provide first-contact resolutions for at least 80% of customer issues, was hatched. HR Connect began limited operations a year and several hires later, with full rollout in July 2015.

3.   How exactly is the program or policy innovative? How has your innovation changed previous processes, products or services? *100 word maximum.*

The concept of "good enough for government" is not good enough for Durham. HR Connect completely changes the usual interactions between City staff and Human Resources. HR Connect now handles all initial customer contacts, provides consistent first-contact responses more than 80% of the time, and tracks customer contacts to ensure timely resolution. This frees up our HR specialists and managers to focus on more strategic issues. Taking a page from the private sector, we developed a custom cloud-based app to build a departmental knowledgebase and customer tracking system (COSMO), important tools in our fight against inefficiency, frustration, and dissatisfaction.

4.   Explain how the program or initiative substantially stretched or improved the boundaries of ordinary governmental operations. *200 word maximum.*

HR Connect is all about connecting our customers with the HR answers they need. Successfully implementing this service model has required stretching boundaries within our department and across the City. HR Connect uses cloud-based software that was outside the boundaries of normal City operations, requiring us to prove its value to the Technology Solutions Department to win approval for implementation. Externally, we are retraining customers to call HR Connect first, instead of calling HR specialists or Managers directly. We have used posters, flyers, articles, meetings and videos as change management tools, explaining how HR Connect works and the new (simpler) processes we're asking customers to follow. We have made HR customer service data-driven, constantly monitoring performance data drawn from call records, customer surveys, and COSMO to identify better ways to serve our customers. Internally, we are freeing specialists and analysts from spending time answering repetitive questions. By tracking customer interactions, HR Connect reduces rework. We get work done right the first time, reducing customer combativeness that HR interactions sometimes lead to. This all improves the efficiency and effectiveness of our customer interactions, freeing up staff time to work on more strategic issues that benefit the entire City.

5. What individuals or groups are considered the primary initiators of your program? How does the innovation engage stakeholders or demonstrate high performance teaming? Were strategic partnerships and/or community networks developed as a result of the innovation? *200 word maximum.*

The Human Resources Department is the primary initiator. We received support from the Technology Solutions (TS) Department to get approval for the cloud platform used to build the Knowledgebase and COSMO. These applications were built by an intern from the City Manager's office, as this was a need that had Citywide importance. TS also assisted with the setup of our phone system and the acquisition of other supporting software and hardware. We teamed with the City's citizen call center, Durham One Call (DOC) to help with the development of procedures and performance standards. Regular working meetings are now held with DOC and other customer service personnel in the Solid Waste, Water Management, and TS departments to discuss common issues. As awareness of HR Connect grows, we are developing partnerships with other departments and community organizations who may have information or services that are of value to the employees and citizens who contact us first.

6. If a private consultant was used please describe their involvement, identify the consultant and/or firm and provide contact information. *100 word maximum.*

N/A

7. To what extent do you believe your program or policy initiative is potentially replicable within other jurisdictions and why? To your knowledge, have any other jurisdictions or organizations established programs or implemented policies modeled specifically on this project? Please provide verification of the replication. *200 word maximum.*

This initiative is replicable. Any HR Department or other service department of a certain size could follow the HR Connect model. The keys are getting a few dedicated staff to serve in this role, some form of standardized knowledgebase for them to refer to, and a customer tracking system to ensure high-quality service. We are not aware of any direct replications of HR Connect as of yet, but it's still early!

8. What were the costs? What were the savings? *100 word maximum.*

We reorganized the department and reclassified three full-time positions to create HR Connect. The average salary of the HR Connect team is about half of a specialist/manager, so we can calculate a 50% savings on first-call resolutions, totaling $12,000 over the first six months. We purchased phone hardware for each team member, costing $1,750 total. Software purchases included Quickbase to build the Knowledgebase and customer tracking system ($5,000 annually) and Camtasia to produce videos ($249 one-time). Team training was $2,500 total. Miscellaneous items and additional printing costs totaled less than $500 and should decrease over time.

9. Please describe the most significant obstacle(s) encountered thus far by your program. How have they been dealt with? Which ones remain? *200 word maximum.*

Existing HR staff members were slow to adopt the customer tracking system, viewing it as additional work. We countered this with thorough training and documentation of the advantages of the system, such as helping staff resolve cases more quickly. We also report customer data in weekly managers meetings for accountability. We are not yet at 100%, but usage of the system has dramatically improved.

We have also had challenges with our customers. Long-term employees in particular still sometimes refuse to speak with HR Connect, even for simple tasks. They are comfortable with certain HR staff, and they insist on speaking only with them. We are still in the rollout phase, so we have not taken a hard line on this, but we are constantly emphasizing the benefits of working through HR Connect first.

Holding on to our high-quality staff could be a future issue. Through the course of their work, our staff are exposed to many other roles within HR and across the City. Getting great people into the right role in the City is of course the goal of HR, but if HR Connect becomes a high-turnover launching pad, it could pose challenges to our service standards.

10.   What outcomes did this program or policy have? What baseline data did you collect? How did you measure the change based on the intervention, and why do you believe in the credibility of this assessment? *200 word maximum.*

We are capturing a robust array of data, which should allow us to understand the efficiency and effectiveness of HR Connect as it develops. Data points include:
• Contact volume (calls, emails, walk-ins)
• Issue type
• On-time issue resolution rate, as defined by service level agreements
• First contact resolution rate
• Call duration, hold time, abandon rate, date & time, etc.
• Post-contact customer satisfaction survey responses
• Annual HR customer survey results

The 2015 benefits open enrollment period was HR Connect's first big test. In one month, HR Connect staff received 603 open enrollment-related questions, answering 91% of those on the first contact, saving the Benefits team from 549 customer queries. Since February, HR Connect has a first-contact resolution rate of 80% for their 3,767 customer contacts. This is a dramatic time savings for our specialists and managers. Quality has been high as well. Customers receive a survey after each case is closed. Out of 374 responses:
• 95% agree that they were treated in a friendly and professional manner.
• 94% agree that it was easy to contact HR Connect
• 55% rated their service as Delightful and Amazing, and an additional 33% rated us Very Good. Only 2% have found their experience unsatisfactory.

11.   Has the program received any press or other media coverage to date? If yes, please list the sources and briefly describe relevant coverage. *100 word maximum.*

HR Connect was covered by the City of Durham's "City Hall This Week" program. Video of their coverage is available on YouTube: https://youtu.be/jADC-NLJUV0

12.   Please provide web links where the innovation can be seen/tested (in the case of something that is web-based) *100 word maximum.*

Elements of HR Connect can be seen in this coverage from the City of Durham's "City Hall This Week" program on YouTube: https://youtu.be/jADC-NLJUV0.

13.   Please provide any key references and their contact information who can be interviewed/called to discuss the innovation and its impact. *100 word maximum.*

Regina Youngblood, JJ Scott, and Andrew Bullard with the HR department should be first contacts, and their information is given above.

14. You've been to a lot of conferences. TLG should be a unique experience for everyone. Describe how your case study presentation will be different than other conference presentations. *200 word maximum.*
    - How will you make the session creative and unique?
    - How do you plan to be both entertaining and educational?
    - Include a description of how your session will facilitate group activities and/or interaction.

HR Connect has completely changed the way customers interact with the HR Department. On a daily basis, the team saves the day, helping customers in distress and giving a crucial helping hand to our HR Specialists. In our presentation, we want to play up these aspects using a superhero theme. We envision live-action skits, costumes, props, pre-produced videos and more, all illustrating key HR Connect concepts in a fun and memorable way. For example, we might portray various pieces of our customer service function (Customer Service Tracking System [COSMO], Knowledgebase, Intranet site, data analysis, staff, etc.) as characters coming together to form the superhero team HR Connect (similar to the Avengers, right?), fighting supervillains like inconsistency, poor communication, delayed responses, wasted time, and other threats to our organization's success.

The audience will be involved through informal interactions during presentation segments (offering relevant examples from their workplace, for example), and during small group work that might include:

• Coming up with ideas for improving customer service in their organization or department

• Brainstorming ideas for overcoming common roadblocks to dedicated customer service teams

• Making superhero sock puppets to help them bring a super customer service philosophy back to their organizations. Yup.

15. Anything else you would like to add? *200 word maximum.*

As mentioned before, the HR Department sees HR Connect as an excellent opportunity to introduce new staff to the various functions of a Human Resources department. As openings in the department arise, HR Connect staff could be strong candidates. Moving employees up and into roles that fit their skills and interests is a benefit of the HR Connect model.

A key aspect of HR Connect is the new opportunity we have to understand our customers thanks to all of the data we are now collecting. We know who is contacting us, when, how and why they are contacting us, and how happy they are after contacting us. We know how many customer contacts each of our HR Teams handle each week. We can see how their workload changes over time, and how the mix of queries changes depending on what is happening at the moment. All of this allows us to proactively serve our customers. We can develop better communications about issues that we get a lot of questions on, or change our staffing levels according to projected demand. Our stated goal is to delight and amaze our customers. The data is helping us do just that.