

## Customer Service Request Systems

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Dear Reader:

The following document was created from the MTAS website ([mtas.tennessee.edu](https://www.mtas.tennessee.edu)). This website is maintained daily by MTAS staff and seeks to represent the most current information regarding issues relative to Tennessee municipal government.

We hope this information will be useful to you; reference to it will assist you with many of the questions that will arise in your tenure with municipal government. However, the *Tennessee Code Annotated* and other relevant laws or regulations should always be consulted before any action is taken based upon the contents of this document.

Please feel free to contact us if you have questions or comments regarding this information or any other MTAS website material.

Sincerely,

The University of Tennessee  
Municipal Technical Advisory Service  
1610 University Avenue  
Knoxville, TN 37921-6741  
865-974-0411 phone  
865-974-0423 fax  
[www.mtas.tennessee.edu](https://www.mtas.tennessee.edu)

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## Customer Service Request Systems

**Reference Number:** MTAS-728

Across the United States, cities use a variety of systems to handle daily service requests and complaints from their customers. By learning some of the essential elements that are key to a successful system, you can plan such a system based on your city's needs and resources.

Many towns still use manual systems, but the emphasis here is on computerization. Automated service request systems are proven to be cost-effective, labor-saving devices that greatly enhance management efficiency. There are a number of commercial software packages available that are PC- or server-based. Another option is a hosted or web-based solution. A few of the software vendors are listed later in this section.

### ***Creating an Effective Service Request Procedure***

For a service request procedure to be effective, you should answer the following key questions:

- Who takes and records the calls? Who takes the information when a citizen drops by city hall?
- How is each request assigned to the appropriate department, and who does it?
- When and how does the city respond to the citizen concerning the request? How many times is the citizen contacted (for example, a letter to the citizen acknowledging the request, a status report, and a note upon completion) concerning the status of the request?
- Does the citizen have an opportunity to assess city hall's performance?
- Who is responsible for monitoring the status of each request and complaint? Is a status report generated listing open concerns?

## Receiving Citizen Requests

**Reference Number:** MTAS-1445

There are several methods for receiving and recording citizen service requests and complaints. One way is to give the job to the staff person who answers the phone. This could include anyone from the mayor or mayor's secretary to city council members or individual department heads.

If this method is chosen, any city worker who ever answers a phone must receive training on how to respond to citizen calls. The person taking the call would also be responsible for keying the information into the automated request system (ARS).

Entering the request into the ARS gives access to anyone who needs to check the status of unresolved requests. The request would also be automatically routed to the appropriate department for service. This method is an excellent way to prevent citizens feeling as though they are getting the "runaround," and it showcases the advantages of keeping the records in an ARS.

Many cities have had success with a "hotline" or central phone number, staffed by trained employees whose sole responsibility is to receive and record calls on the ARS. (ARS can automatically alert the responsible department for service.)

Sometimes the central number is located in the mayor's or other city office where the calls are taken, recorded, and routed to the appropriate department by a secretary or the city manager. Elected officials and their staffs may be responsible for receiving and recording calls or for receiving them and sending them to the city manager, who enters them into the computer.

A few cities have dispatchers taking service requests 24 hours a day, while others have answering machines to record requests and complaints after hours and on weekends. In some cities, officials are available in shopping malls one day a month, while other cities simply place easy-to-use computer terminals in the malls so citizens can enter requests themselves.

Any time a central number or other centralized system is used, it must be well publicized and staffed with knowledgeable employees. When someone answers the phone who has nothing to do with service requests, this person can only transfer callers to someone else. Even if the employee connects the citizen directly to the central number, the caller may still be forced to repeat the request.

A centralized system prepares individual departments to receive and document calls coming through to them. The departments should either take responsibility for the request or refer the information to the appropriate department through the central number. In either case, the department should forward the information to the central office for filing.

Many cities have no centralized system and put the entire responsibility of calls on individual departments. Each department must take and document the calls they receive, track them, and respond to the citizen. This scenario increases the chance that a request might be lost or mishandled. Without a centralized system each department must be prepared to take and record even those calls it is not able to service, then forward all the information to the appropriate department. For maximum efficiency, the city's website and/or phone book listing should be revised to include descriptions of the type of service performed by each department.

### ***How is each request assigned to the right department?***

Most commercial software packages will automatically assign the request to the appropriate department when the entry is added to the software. Some software packages automatically generate a hard copy of the work order for the appropriate department and prioritize each request by giving it a code number.

Once the information is properly routed, the department must be accountable to someone in city hall, ensuring follow-up. This can be done in two ways. In some cities with a centralized system, the department reports how the request is handled to the community services office, the mayor, the city manager's office, or to the location of the central number. In other cities, all information forwarded to the responsible department is also sent to the city council member for that constituency. As actions are taken, notations are added to the original service request or complaint.

Everyone involved should have access to the service request record and updates, thus maximizing status tracking. Several ARS packages can produce a case list of unresolved requests and complaints to be investigated by the relevant departments.

## Assigning a Citizen Request

**Reference Number:** MTAS-1446

Most commercial software packages will automatically assign the request to the appropriate department when the entry is added to the software. Some software packages automatically generate a hard copy of the work order for the appropriate department and prioritize each request by giving it a code number.

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## Responding to a Citizen

**Reference Number:** MTAS-1447

It's important to keep in touch with citizens who have asked for service or have complained. If the request is made in person or on the phone, the first contact is to acknowledge receipt of the request and thank the citizen for the information. Some cities also contact the citizen upon completion of the work.

When acknowledging receipt of a service request by letter, e-mail or phone, it's typical to give a date the request will be handled and to name the department handling it. In a centralized system, it's a good practice to have the department give the citizen a call back the same day, since many problems may be resolved before a letter is received.

Callbacks and e-mail are significantly less expensive than letters for towns with a lot of citizen service requests. Charlotte, N. C. aims for a one-day callback. The citizen is told when the work will be done,

that the work is completed, or why it can't be done at all. Most cities will track work progress for any citizen who asks.

Many cities make contact with a citizen only when the request is satisfied. Towns with smaller budgets and those with a large amount of service requests should remember that a phone call or e-mail is cheaper than postage. Another option is to leave a notice at the citizen's door after the work is done.

## Assessing Staff Performance

**Reference Number:** MTAS-1448

Many cities give citizens a chance to evaluate the service by providing pre-addressed, paid response cards. These may be automatically mailed when a request or complaint is received, or mailed or left at the citizen's door after the work is complete. Citizens are sometimes asked to return the cards to individual departments, but they're usually sent to the city administrator or mayor's office. Some local governments send evaluation cards periodically to a set number of randomly selected citizens to get a reading on community satisfaction.

## Monitoring a Service Request

**Reference Number:** MTAS-1449

Most cities run a routine status check to monitor progress on each request or complaint. A community service office or the central office that received the request usually is responsible for following up. When a department takes action or completes the work, this information must be entered into the computer so it won't continue to register the request as open.

Although several authorized staff members have the freedom to check the computer daily for the status of requests, most cities use ARS that generates hard copies of status reports, which can be issued weekly or monthly to keep current information in the hands of the city manager and council.

The leading automated request systems produce a variety of useful reports, including:

- The number of requests within a specific time period;
- Action taken and whether the problem is resolved;
- Who handled each complaint;
- How long it took to complete the work;
- The number of calls per department;
- The number of particular types of calls within a department; and
- The number of evaluation cards returned, and number of calls per city ward or district.

The number of calls per city ward can be useful in pinpointing geographic problems. The ARS can match the locations of requests and complaints automatically against a citywide database, then coordinate and merge multiple citizen requests from the same area into one entry. Analyzing data by geographical area, along with the type of service request and responsible department, is helpful in identifying trends and managerial problems. This information also comes in handy when predicting where similar problems may occur in the future.

Ward information is a useful tool in election years. It allows the city manager's office to provide elected officials with a list of all requests and complaints from their constituency, the names of the citizens, and the actions taken.

## Automated Request Systems

**Reference Number:** MTAS-1450

By using the chief components outlined in this report, your city can develop an efficient automated request system. Computers are a growing necessity as vendors continue expanding their software to

include capabilities municipalities need. MTAS does not endorse the following automated request systems, but includes them as examples of the packages that are available for request tracking. A brief summary of what each offers is included.

**CarteGraph**

<http://www.cartegraph.com> [1]

CarteGraph seems to be designed with a focus on public works and integrating ESRI's ArcGIS systems. It offers tools within its products for managing both internal and external service requests. You can create standard operating procedures for each request received. You are then able to monitor the requests and complaint status. The software will also allow you to log phone numbers and addresses for constituents.

**Tyler Technologies**

<http://www.tylertech.com/solutions-products/energov-product-suite/energov-citizen-self-service> [2]

Tyler Technologies offers EnerGov. EnerGov is specifically designed to automate and centrally connect critical processes, including land use planning and project review, regulatory management, inspections, code enforcement, citizen requests, asset management, work order management and more. One of the modules is Energov Citizen Self Service software is designed to manage citizen requests.

**QScend Technologies, Inc.**

<http://www.qscend.com/> [3]

This system is a hosted web-based system. It provides a wide variety of features and offers reports by street or district. It also links multiple occurrences of the same complaint and stores everything in a database.

Additional information is available at each vendor's website.

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**Links:**

[1] <http://www.cartegraph.com/>

[2] <http://www.tylertech.com/solutions-products/energov-product-suite/energov-citizen-self-service>

[3] <http://www.qscend.com/>

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