

County of Santa Clara

Technology Services and Solutions Department

FY24-27 Customer Service Program

Vision and Mission

The development of a Customer Service program will bring our customers' voices to the technologies in which we invest, consistently aligning service offerings with users' needs and expectations. We will strive to understand our customers and the ways they work before defining our solutions. This customer-centric approach involves listening to what our customers are saying and collaborating to define solutions that work for them. The purpose is to measure, understand, and improve the customer experience across every part of the County. We will ensure that seamless and intuitive services are defined and delivered to meet the needs of our customers in alignment with the County's broader objectives. Our six primary customer service operational goals are:

1. Establishing customer groups to understand what our customers want.
2. Formalizing our response to customer feedback.
3. Providing training sessions focused on customer service.
4. Evaluating our current TSS service portfolio.
5. Focusing on user friendly solutions and collaboration.
6. Investing in a robust service management platform that is reflective of the size, scope, and needs of the County's workforce.

1. *Customer Groups*

Beginning in spring 2024, TSS will initiate customer groups, asking them a series of questions. Customer effort questions are a standard way of measuring customer experience. An example question is asking "Does TSS makes your job easier or harder?" Examples of other questions include how someone may have felt after interacting with TSS and what challenges they may have encountered with TSS. This customer-first process will help us understand the challenges or obstacles our customers face and establish a mechanism for understanding their unique perspectives and expectations. By leveraging qualitative and unstructured feedback, we will build a series of initiatives based on these discussions. We will communicate back to the customer groups about how their feedback was implemented.

2. *Survey Response*

Transactional Surveys

Ticket-based transactional surveys are emailed to customers after a ticket is resolved by TSS. The survey is based on an algorithm in TSS' IT Service Management software. The survey is comprised of five multiple choice (strongly agree to strongly disagree) questions about how

satisfied the customer is with the outcome of the ticket resolution, and a section for comments. Our score for FY24 to date is 92% based on 6,350 surveys. Under the Customer Service program, we are establishing a subcommittee comprised of members from each of the TSS divisions to formalize our response to the surveys. These members will be responsible for reviewing the surveys to analyze trends within their service areas. In addition, they will be responsible for talking to customers who had suboptimal experiences so we can improve our approach to service delivery.

The outcome of this analysis is to develop action plans to improve our services. By using a continuous quality improvement approach, TSS will be enabled to respond quickly to issues with our service delivery chains. This committee will also be tasked to improve our current 12% survey response rate to an industry standard rate of 30%.

Net Promoter Score (NPS) Survey

According to our NPS survey for the last year, our overall score is 93% of approximately 1,374 employees who stated they would choose TSS as their IT service provider over other providers in the industry. The scores are evaluated per each vertical that TSS supports. Comments can also be entered on the survey. As part of the Customer Service Survey Response subcommittee, the participants will be tasked with reviewing negative surveys and reviewing all comments to identify trends or glean any actionable items. Additionally, while the overall score is very high relative to any industry standard, our NPS return rate is only 16% as compared to an industry response rate of 25%. We will also review ways to improve the overall response rate to the NPS.

3. Customer Service Training

TSS offered a customer empathy class in 2022. In CY24, TSS will continue offering training sessions that focus on customer service best practices, communication, and customer empathy. Training in customer service and empathy equips TSS with the skills necessary to understand and effectively respond to customer needs and emotions. This awareness leads to improved customer satisfaction as customers feel heard, understood, and valued. Training programs related to empathy also make TSS staff feel valued and supported by their organization.

4. TSS Service Portfolio Redesign and Process Improvement

The TSS Service Portfolio maintains a comprehensive list of an estimated 40 IT services that are provided to TSS internal and external departments. During CY24, we are evaluating all IT services and understanding how they are consumed, if they meet the current needs of the business, and whether our customers are satisfied. The services will be redesigned and mapped from the customer's vantage point aiming at more transparency and a frictionless experience for our 23,000 employees. We will begin our evaluation with our highest volume services including telephony, workstation, and County mobile devices. An early result of the telephony review

includes removing desk phones and replacing them with soft phones where business appropriate.

In addition to this overall review, we will map internal business processes and make it simpler for customers to understand where to access an internal County service, such as IT professional services or an IT service, for example on-boarding a new employee (e.g., obtaining logins and acquiring a laptop) or establishing wireless internet service for a new building. This extensive services evaluation will realign our solutions with the needs of the customer.

5. *User-Friendly Solutions and New Technology*

Whether solutions are procured or built internally, the solutions must be user friendly and intuitive. TSS will add steps in our solution acquisition process to prioritize user-friendly interfaces and documentation. Our current implementation process involves actual users in the testing and acceptance phase of new applications or system upgrades. By updating and adhering to our processes, we can ensure that the voice of the customer is being heard and understood when systems are selected, implemented, or upgraded.

Consistent with industry practices, TSS has established workshops on technology trends so IT staff can understand how new technologies may benefit customers. Our County technology partners (Office of the County Counsel, Privacy Office, and Information Security Office), as well as our customers, have been involved in these workshops. Additionally, TSS encourages learning from the rich ecosystem of the Silicon Valley by attending professional development opportunities.

By fostering continuous collaboration between TSS and other County departments, these communications ensure that technological solutions align with customer needs and are modern, secure, and efficient.

6. *TSS IT Service Management (ITSM) Platform*

IT Service Management (ITSM) refers to the entirety of activities, processes, and policies designed to form, deliver, manage, and improve the way IT is used within an organization. The primary goal of ITSM is to ensure that IT services are aligned with the needs of the business and deliver value to customers. In 2020, TSS began our ITSM journey in earnest by implementing the County's first ITSM application based on Information Technology Infrastructure Library (ITIL). While this application has served us well as we began our maturity journey, we must seek out a more robust and complete IT service management application for the County. We need this new application now more than ever to improve the services we offer to our customers.

TSS is currently in the process of developing a request for proposals (RFP) for a new ITSM application via County Procurement. The RFP covers all aspects of ITSM including incident and request management, knowledge management, change management, asset and warehouse

management, major incident, problem management, modern analytics, and an enterprise portal (aka Ask Clara). While the new application must serve TSS operational needs, it must also provide a portal for other County services that our customers or our constituents could possibly request. An enterprise portal could potentially include a consolidated service system for facilities, biomed, and procurement requests. This enterprise approach to ITSM will ensure that we can further enhance the customer experience, not only for TSS services, but for the broader organization.

By implementing a sophisticated and comprehensive ITSM application for the County, we will increase our engagement at the business level by providing groundbreaking functionality to provide ease of use to our customers and knowledge-based information for their issues, as well as the ability to easily customize workflows (e.g., employee on-boarding and off-boarding), a mobile platform, and an enterprise approach to all services used in the County. This will enable us to produce more transparent and dependable analytics to measure our outcomes and identify common issues and trends.

In addition, we will provide our TSS staff with a state-of-the-art tool to improve our responses to incidents and requests in terms of quality and time. Predictive analysis and key performance indicators (KPIs) are critical components of the ITSM selection process. Predictive analytics can be used to monitor systems proactively to identify potential anomalies and issues before they impact customers, minimize downtimes, and are used to anticipate future customer needs. With a new system, we can produce routine KPIs and distribute them at the individual, management, executive, and service levels. The KPIs will be used to gauge performance, identify areas of improvement, and evaluate changes. Incorporating predictive analysis and KPIs into an ITSM tool empowers organizations to transform their IT operations from reactive to proactive, thus elevating IT and customer satisfaction.

TSS is vetting top tiered ITSM vendors as candidates to receive the RFP. At least two prominent vendors in this preliminary list are in Silicon Valley. The RFP will be completed in April followed by the procurement process. The current plan is to implement the application in a phased approach, the first being to replace the existing ITSM application which is at end of life in December 2026. The second phase will focus on an enterprise approach to services. Additional costs and resources will be required for the new application.

Conclusion

With our new customer service strategy and goals, TSS is emphasizing a voice of the customer approach. By implementing a rigorous and defined customer strategy in support of the TSS Strategic Plan, we will bring customers (aka the human experience) to the forefront of all our services and applications. We are eager to update the Board on our achievements in this critical area. We are proposing a follow-up report in a year to discuss our progress towards our customer experience journey.