



24-5334

**DATE:** April 16, 2024 (Item No. 20)

**TO:** Board of Supervisors

**FROM:** Nina D'Amato, Chief Information Officer

**SUBJECT:** Response to Board Referral Relating to Customer Service

### **RECOMMENDED ACTION**

Under advisement from January 23, 2024 (Item No. 12): Receive report from the Technology Services and Solutions Department relating to the Customer Experience Program.

### **FISCAL IMPLICATIONS**

There are no fiscal implications associated with the recommended action. The Technology Services and Solutions Department (TSS) will return to the Board of Supervisors in the future with a request for additional funding through the IT Stability Fund for a new information technology service management application.

### **REASONS FOR RECOMMENDATION AND BACKGROUND**

Per the Board of Supervisors' referral of January 23, 2024, put forward by Supervisor Simitian, TSS was asked to present options for the most modern innovations aimed at providing exceptional customer service to County agencies and departments.

Since 2017, when the Management Audit Division reported that TSS' customer ticket system (Information Services Department (ISD) at the time) only tracked 39% of tickets, and basic data about the requests were not consistently tracked, we have taken multiple steps to improve our customer experience:

**2019:** TSS had three separate service desks for ISD, Social Services Agency (SSA) and the County of Santa Clara Health System (Health and Hospital System at the time). These service desks were centralized to improve customer service delivery by standardizing ticket processes, streamlining operations and achieving economies of scale. The TSS Service Desk is available 24/7 and acts as the single point of contact for all TSS-related issues and requests.

TSS offered instructor-led IT Infrastructure Library (ITIL) foundation training to staff until 2023. ITIL is a set of practices and a framework for IT service management (ITSM) focused on creating, delivering, and continuously improving technology enabled services. These

practices are designed to align IT services with the needs of the business. A total of 465 TSS associates completed the training.

**2020-2022:** TSS replaced an antiquated legacy IT service management (ITSM) application and implemented a new ITIL-based software application. This application is used primarily for incidents, requests, hardware asset management, change management, major incident management and problem management. The software also provided the platform for an IT service portal, Ask Clara, which our customers use to submit approximately 50% of TSS' tickets. This application also submits an algorithm-based transactional survey for individual tickets upon resolution. Our overall score for Calendar Year 2023 was 92%.

**2021:** TSS added six full-time employees to the service desk to improve response times. While still understaffed by ticket-based metrics, these additional employees improved our response times to our customers.

TSS initiated a Net Promoter Score (NPS) survey with the goal of reaching every County employee at least once a year. The survey asks this question: If given the choice, would you choose TSS as your IT service provider? In May 2023, the survey was changed from quarterly to monthly. Approximately 2,000 surveys are submitted each month, and TSS associates are excluded. Our aggregate score is 93%.

**2022:** To improve customer experience, all TSS Service Desk and Field Support staff completed a customer empathy training program. The virtual instructor-led class titled "Exceptional Customer Service Training" was provided by a TSS vendor. This class emphasized customer service skills and focused on using communication to improve our response to our customers. The class was very well received, and approximately 100 TSS staff members completed this course.

While TSS has made steady strides in improving customer service, we recognize it is a continuous quality improvement process. Incremental changes and strategic initiatives are crucial to enhancing our interactions with our customers and improving overall satisfaction with TSS services. Goal 4 in the TSS Strategic Plan for Fiscal Years (FY) 2024-2026, Enhanced Customer Experience (attached), highlights our commitment to improve the services we provide to our customers. The objective is to deliver IT solutions that increase productivity and improve efficiency. Benefits of this approach include reduced customer effort and increased customer satisfaction.

In support of this strategic initiative, we are developing a Customer Experience program focused on improving the way TSS interacts with the customer in a systematic approach. Customer experience operational goals include customer groups, survey responses, and IT service evaluations. Another customer experience related goal focuses on implementing an advanced information technology service management application so we can continue to modernize our IT services and processes to improve our ability to respond to our customers'

needs. Please refer to the attached *FY24-27 Customer Experience Program* for more details on our goals and the metrics established to measure progress and achievement.

**CHILD IMPACT**

The recommended action will have no/neutral impact on children and youth.

**SENIOR IMPACT**

The recommended action will have no impact on senior residents.

**SUSTAINABILITY IMPLICATIONS**

The recommended action will have no/neutral sustainability implications.

**STEPS FOLLOWING APPROVAL**

Please send notification of completed processing to Nina D’Amato, Ameen Moslehi, Jecelyn Zaha, and Lisa Bito.

**ATTACHMENTS:**

- FY 24 27 Customer Experience Program
- FY 24 26 TSS Strategic Plan Goal 4 CX Operational Plan