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## Getting a grip

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By Lynn Peisner

Since Baltimore set up the nation's first 311 phone number 10 years ago, more cities have been consolidating agency phone numbers and building call centers to respond to routine questions and requests. Now, residents in a growing number of cities can forgo leafing through the phone book's blue pages to find someone to restrain a vicious dog, repair a broken streetlight or reschedule their garbage pickup. Instead, they simply dial 311.

Answering the call is a live person — not a recording — who has been trained intensively in customer service and can assign a government employee to respond to the problem. Often, the call-taker is using customer relationship management (CRM) software to record residents' complaints, answer questions and submit work orders to government departments. The call centers and the technology that powers them are putting to bed the old-school image of bureaucratic ineptness.

While a good CRM system and 311 call center can streamline government operations and help managers evaluate resources, launching them can be an administrative minefield. Officials in Denver; Miami-Dade County, Fla.; Minneapolis; Hampton, Va.; and Albuquerque, N.M., have learned some lessons from their own 311 projects and offer the following list of their best advice to local leaders who are considering turning to 311 for help.



### 1. Think like the private sector.

CRM was devised for businesses, and it was in corporate habitats that it worked out most of its kinks before state and local governments tapped it to run 311 call centers. Governments, however, still have plenty of issues that might conflict with CRM systems.

Before considering a CRM system, governments should conduct an operational business analysis, or OBA, says Steve Stroud, 311 program manager for the City and County of Denver. First, analyze how efficiently each department operates and how it is organized before trying to match needs with technology. After that, cities might find that only a simple business analysis was needed to improve service to residents — not a full-fledged CRM tool. "You may not be structured correctly, and there might be better ways to focus your resources, your budget, even your time," Stroud says.

### 2. Do not go "cold turkey" until launch.

Miami-Dade County "softly" launched its 311 service in November 2004 by discreetly funneling several agency phone numbers into the system. Residents may have thought they were dialing the phone number for the public works department, but they were speaking with a 311 call-taker. That experience helped ease the call center into high call volumes and identified problems before the number was officially opened for business on Sept. 16, 2005.

Two days later, the county activated its emergency operations center for Hurricane Rita, and 311 made its way onto nearly every media broadcast. "Defining a soft launch period allows you time to test out the technology," says Judi Zito, director for the Miami-Dade County Government Information Center. "We learned a lot in our soft launch, and for us, this period was very important."

3. **Have a philosophy of what 311 will be in the community (and do not bite off more than you can chew).**

311 can mean different things to different cities, depending on their needs. Some take a directory-assistance approach — a 411 for government — in which 311 callers are transferred to the departments that can answer their questions. Others try to answer all questions without transferring callers. “We want to resolve calls on first contact, so we either open the service request for them or give them the answer to the question they had, and they never have to speak to anyone else after they speak to us,” Zito says. “But just providing directory assistance is very valuable, too. People really need to make that decision up front and ask, why am I building this?”

4. **Gradually phase in CRM.**

High-end CRM systems and 311 operations can consolidate every government phone number into one 24-hour, seven-day-a-week call center staffed by specialists trained to answer all questions and follow through on work orders and permit requests. They also may incorporate 311 Web portals that include e-mail options, online forms and live chats.

But an efficient 311 does not have to go live with every last bell and whistle turned on. “There are different flavors of CRM and 311,” Stroud says. “You buy the software and you focus on just the parts that you need to roll out just on day one, and that allows you to gain efficiencies and savings over six months to a year, and then you come in and you may add transactions such as marriage licenses and permitting. But if you phase in the components that you want to turn on, you have total control, and you can make yourself as bulletproof as possible. If you’re on a shoestring and you try to do everything, you’re at risk at every level.”

5. **“Out with the old” is not always the best plan.**

Hampton, Va., started its 311 service on Sept. 13, 1999, with call-takers accessing four different departments’ databases to answer questions. Only since early this year has the city found CRM software that best fit its needs. “I wasn’t going to rush out there and buy a multi-million dollar software system and have it not be what we needed it to be,” says Call Center Manager Liz Nisley. “You don’t have to replace all your back-end systems just to have a CRM package. Other cities should realize that the back-end systems they’ve already invested in may be very good for that office, and you do not need to throw them away. You’ve invested taxpayer’s dollars.”

Minneapolis, which launched 311 on Jan. 4, 2006, also chose a CRM that worked with existing databases. “[Our CRM] system either links to or interfaces with a number of the city’s critical back-office and information systems,” says Don Stickney, call center manager. “Through Web links, 311 agents can enter non-emergency police reports, check on permits and code violations for properties throughout the city and even enter citizen survey information.”

6. **Decide whether 311 will operate 24-7.**

City leaders have strong opinions about 311’s business hours. For some, 24-7 is the only way to go. For others, that is an unrealistic expectation. Albuquerque launched 311 in July 2005 and is on course to handle approximately 500,000 calls per year. Currently, the lines are open 24-7, but initially, the center planned to stay open only from 7 a.m. to 7 p.m., seven days a week. “We changed to 24-7 after discussions with 911 administrators,” says Brian Osterloh, Albuquerque’s CRM project manager. “They correctly pointed out that having 311 available only part-time would be confusing. We do not regret going to 24-7, 365 days a year at the outset.”

Miami-Dade County, however, does not provide 311 around the clock. “It’s kind of a sexy thing to be able to say you’re 24-7, but is the demand there, and is it really the responsible thing to do?” Zito says.

The county has proposed extending 311’s availability to 24 hours a day in 2007, but some leaders are unsure if it is the best use of resources. “In our case, we want to wait to go to 24-7 until we’re servicing those departments that currently have 24-7 operations, departments that might have alarm offices and are currently staffed for 24-7. But there’s no point in having people sitting there to answer the phones at 2:00 in the morning if nobody calls.”

7. **Tell residents that 311 is a free call.**

In Miami-Dade County, residents might have been reluctant to use 311 without public education efforts that

explained there is no charge for the service. "We do a lot of outreach, especially in the elderly community, because the elderly really take advantage of 311," Zito says. "They had this assumption that because 411 is a charged call, that so is 311, and so we really took that into account as we refined our public education. We never even thought that we needed to tell people it was free."

#### 8. **No technophobes, please.**

Albuquerque is finding that employees' computer skills play a significant role in the call center's effectiveness. "As we add processes to our CRM implementation, we are reaching deeper into the organization," Osterloh says. "As we reach deeper into the organization, we are finding decreasing levels of computer literacy. Hence, we will have to address computer literacy prior to CRM training in the near future."

Osterloh adds that it is critical to update the city's Web site and expand it consistently. "We are continually stressing the importance of current, accurate and meaningful Web content, because the Web site is also the knowledge base for call center agents," he says. "[As] more people [are] going to your Web site and finding information or requesting service, [that] means fewer people calling 311. This will reduce operating costs over the long-term."

#### 9. **Make sure everyone can reach 311, no matter what type of phone they use.**

Miami-Dade's 311 administrators had to negotiate separate contracts with all cellular carriers in the area, including Sprint, Verizon, Nextel and many more. "When you implement 311, it's not like 911 where you can automatically call from a cell phone," Zito says. "I didn't think at that time that access through the cellular network would be that popular, but one of the things we found through hurricane season is at certain points in the storm, 50 percent of our calls were coming in from cell phones. So, had we not done that, I think we would have had a lot of frustrated people."

Miami-Dade officials also were surprised to find that some people had set up call blocks on their home and office phones that disabled them from dialing 311. "If I have a cell phone, and I block 411 on it because my kids make a lot of directory assistance calls, that also blocks a 311 call," Zito says. "The same is true for office phones, so you have to go into the system and unblock those numbers. We undertook some outreach efforts to let organizations know if you want your employees to be able to call 311, here's what you need to do on your phone switches to enable that."

#### 10. **Work together.**

Often, governments can be territorial and resistant to other jurisdictions' ideas, but in metropolitan areas with several cities and counties in close proximity, a shared approach to 311 should be a goal, according to Stroud. Denver, which encompasses 32 municipalities, recently invited chiefs of staff, CIOs, mayors and a state representative to discuss standardizing 311 practices in the area and forming a regional advisory council.

Stroud says that regional — and ultimately national — standardizations will make 311 most effective. "If I live within one jurisdiction, and I work in another, and I call to [report] a loose dog, and I get different treatment in different areas, that means a lot to me," he says. "Because then I'm going to get that stereotyped image of government, where this agency can do it, but this one can't — that image that government doesn't know what it's doing."

Stroud believes that terminology for 311 questions and answers, categories and solutions should be standardized to some degree across the country. "When you read all the reports issued by FEMA and Homeland Security, especially in the past two years, one of the biggest things they find is that municipalities use different terminology, which results in discrepancies when they communicate," he says.

Cities that already have 311 centers and CRM systems operating can offer advice based on their experiences. "Call another municipality ... more than one, four or five, that have done it," Stroud says. "Talk to them, interview them, make a trip out there. If you've got a vendor or a systems integrator or a project manager who's going to do this for you even as a consultant, take them with you, so that they truly understand the scope of what you're trying to do. In other words, do your homework. That's the most important part."

*Lynn Peisner is an Atlanta-based freelance writer.*

#### **Albuquerque, N.M.**

**311 launched:** July 1, 2005

**Call volume:** 500,000 calls annually

**Most popular calls:** Animal issues and parks and recreation questions

**CRM software:** Oracle-PeopleSoft CRM version 8.9 (formerly PeopleSoft CRM v8.9)

**311 consolidated:** More than 30 phone numbers

**Cost:** \$5.4 million to launch  
\$3.8 million annual operating budget

#### **Hampton, Va.**

**311 launched:** September 1999

**Call volume:** 750 calls daily

**Most popular calls:** Property assessment calls for information, public works and inspections for services, and animal control

**CRM software:** Lagan Frontlink

**311 consolidated:** 25 phone numbers

**Cost:** \$350,000 to launch  
\$575,000 annual operating budget

#### **Miami-Dade County, Fla.**

**311 launched:** Sept. 16, 2005

**Call volume:** 801,132 calls in 2004-2005; expecting 1.5 million calls this year

**Most popular calls:** Stray dogs and missed garbage pick-ups

**CRM software:** Motorola CSR for the service request component. Avaya Call Management System

**311 consolidated:** 10,000 topics for 35 cities, including 21 public works departments

**Cost:** \$16 million to launch  
\$10 million annual operating budget

#### **Minneapolis**

**311 launched:** Jan. 4, 2006

**Call volume:** 1,633 calls daily

**Most popular calls:** Calls are seasonal: snow and ice removal requests and abandoned vehicle reports in winter; environmental nuisance complaints such as air quality, odors, noise, water pollution, illegal dumping and chemical spills and graffiti complaints in summer

**CRM software:** Lagan Frontlink

**311 consolidated:** 16 departments

**Cost:** \$6.2 million to launch

\$2.7 million annual operating budget

**Denver**

**311 launched:** July 7, 2006

**Call volume:** Expecting 3,200 calls daily

**Most popular calls:** Street maintenance and animal control

**CRM software:** PeopleSoft CRM

**311 consolidated:** 1,200 phone numbers

**Cost:** \$3.5 million to launch  
\$1.5 million annual operating budget

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