



# Customers Observing and Researching Experience (CORE) Executive Summary

## The Customer Service Group

The **Customer Service Group (CSG)** of the Mayor's Office of Operations was established by Executive Order 115 on May 15, 2008. The goal of this office is to monitor and improve customer service using a centralized, strategic approach, through cooperation and coordination among City agencies. CSG works with a 28-agency steering committee to understand the current customer service operations at City agencies, to document and share leading practices, and to create standards and strategies for improving the experience for New Yorkers who interact with City agencies.

Customer service is an essential component of the way New Yorkers experience the City and the government that serves them. Through more than 40 agencies, the City provides a diverse set of services to an enormous and varied customer base, including businesses, commuters, and 8.275 million residents. According to the *May 2008 Citywide Agency Customer Service Survey*, in 2007 New Yorkers had more than **32.1 million contacts** with City agencies to receive information or services by phone, letter, email or in-person. Agency walk-in facilities manage at least **9.2 million customer visits** annually, constituting nearly 29% of reported customer contacts. Agencies also provide information to customers through an approximated **65.4 million annual web visits**. Until recently, there has not been a comprehensive effort to centralize oversight and measurement of customer service.

## CORE Program Background

The **Customers Observing and Researching Experiences (CORE)** program was a secret shopping program implemented in the City of New York during the summer of 2008 and the largest municipal initiative of its kind. Secret shopping provides a tool for assessing quality of service, without the service deliverers knowing they are being assessed. Secret shopping is widely used by businesses to assess and improve customer service, as well as by many government entities. In addition, several agencies, such as the New York Police Department (NYPD) and the Department of Health and Mental Hygiene (DOHMH) currently use secret shopping as a tool to both improve the customer experience and their customer operations.

The program, which operated as a pilot, identified key strengths and challenges from the customer perspective and provided objective, actionable feedback to help improve city services. The CORE Program was developed and implemented over the course of four months. Results were collected and analyzed by CSG staff and interns.

## Methodology

The CORE Program used trained observers to represent real customers and requested actual services, information and referrals from agency walk-in facilities across the five boroughs. Observers were provided basic background information and made service inquiries or requests related to the facilities' primary services. Observers had limited knowledge of an agency prior to visiting; as such, observations were made from the perspective of a first-time customer.

Facilities were assessed through two methods:

- I. Quantitative score in five key areas of customer service
  1. **Language Access.** Could customers obtain services in their preferred language?
  2. **Site & Service Accessibility.** Was the facility easy to find?
  3. **Queuing Experience & Service Transparency.** Was it easy to know where to go, what to do and what documents were needed to obtain services?
  4. **Facility Conditions.** Was the facility clean and well-maintained?
  5. **Staff Customer Service.** Was staff courteous and knowledgeable?
- II. Qualitative assessment was documented in a descriptive response
  - Short answer format included actionable suggestions and observations
  - Observations emphasized the human side of service experience



Quantitative scoring was captured in real-time by CORE observers through a BlackBerry-based form with GPS tracking. It included 53 data points across the five key assessment areas. Observers evaluated walk-in facilities as poor, fair, good, or excellent. These evaluations were translated to a 4.0 scale for further analysis. The overall score was calculated by providing equal weighting (20%) for each assessment area.

## Results

On a citywide level, the CORE program gave solid marks to observed agency walk-in facilities in the five key observation areas.

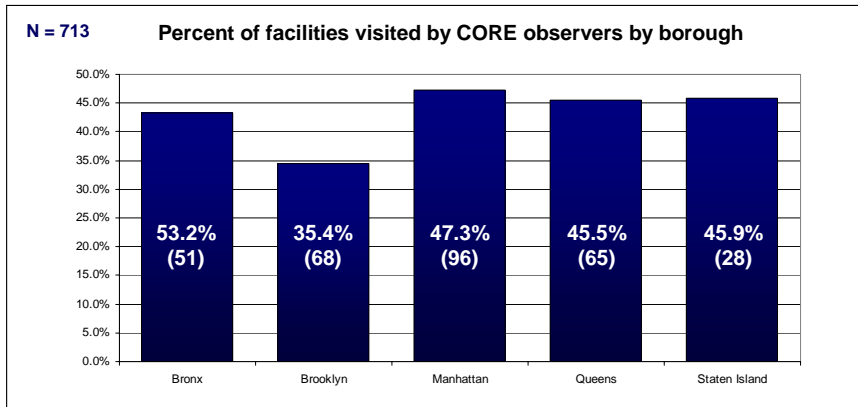


Figure I: Agency facilities visited by CORE – Borough Breakdown

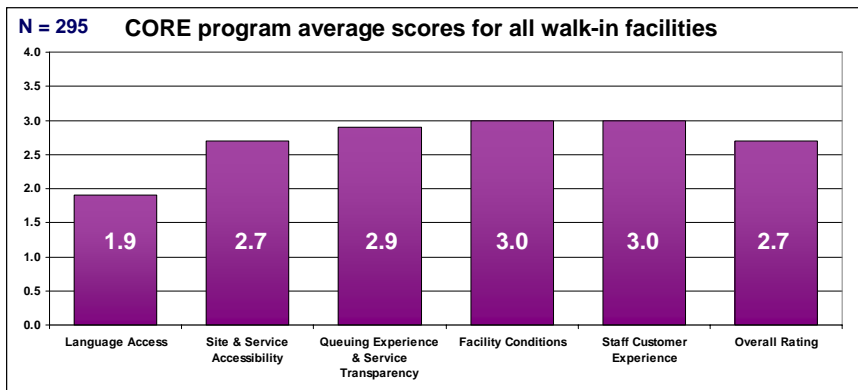


Figure II: CORE program average scores for all walk-in facilities

The City of New York has 713 distinct walk-in facilities managed by 25 agencies. Through CORE, 22 trained observers visited 308 distinct walk-in facilities (43.2% of all sites) within all five boroughs. These 713 sites include 219 FDNY firehouses as well as 84 NYPD precincts and related customer facilities. Excluding firehouses and precincts, CORE visited 68.0% of all agency walk-in facilities. On average, 12.3 sites (81%) were visited per agency, with a median of 8 sites.

The majority of the 295 sites reviewed by CORE observers were given solid marks, with an overall average of 2.7 on a 4.0 scale. Ten sites were not rated, as they were unable to be located, closed for staff events, or closed altogether. An additional three facilities were shared with other sites rated by CORE; as such, only a description was provided.

In addition, CORE observers were provided 646 documents, pamphlets and forms during the course of their facility visits. 129 out of 295 service sites (43.7%) provided materials for customers to review at home. These documents will be reviewed for customer friendly language and design.

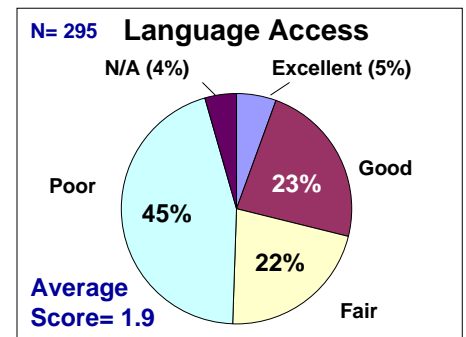
### I. Language Access

*Few agency walk-in facilities offered easily accessible translation and/or interpretation services*

Historically, most city agencies have not focused on customer support in multiple languages. This year, Executive Order 120 was signed and required every City agency that has direct interaction with customers to provide language assistance services to limited English proficient (LEP) customers.

While some agencies made language access a priority by providing multi-lingual signage and advertising interpretation services, CORE observers found that the majority of sites had few resources for LEP customers.

For the majority of sites observed, translated signage or materials were either minimal or non-existent. Spanish was most often accommodated for sites providing multilingual signage. 56% of agencies visited provided documents in languages other than English. There was little or no consistency in the types of translated materials provided by agencies across their facilities.





Interpretation services were also limited. CORE observers found bilingual employees at only 32 sites (10.8%), phone interpretation at only 46 sites (15.6%), and both bilingual employees and phone interpretation at 13 sites (4.4%). Observers did not find any resources for interpretation at 204 sites (69.2%).

CORE observers still found challenges at the 30.8% of locations with some form of interpretation available. While multiple agencies currently contract with a telephonic interpretation service such as Language Line, utilization was impacted by customer and employee awareness or even issue complexity. Sites frequently lacked signs indicating telephonic interpretation service was available. Also, customer service staff used informal methods to obtain in-person interpretation services. For example, customer service staff asked back-office staff to interpret for a customer, or even asked other customers to serve as interpreters. Finally, even when interpretation resources were available (telephonic interpretation, bilingual employees, etc.), LEP customers were asked to bring a family member or friend to interpret on their behalf.

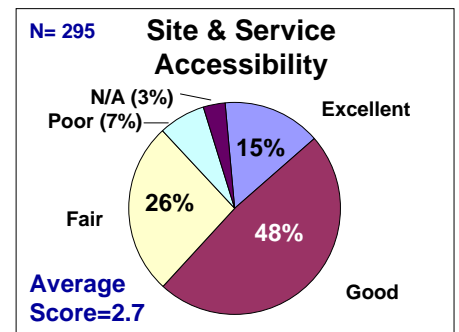
## 2. Site Service & Accessibility

*Clear signage greatly impacted the overall customer experience*

Overall, site and service accessibility for agencies was given solid ratings, with a 2.7 rating on a 4.0 scale. Signs were rated 2.7 for accuracy and professionalism, 2.4 for communicating processes and requirements, and 2.4 for directional accuracy.

Lack of professional, informative signage was frequently seen in walk-in facilities. CORE observers noted that sign content often omitted key information necessary to a customer, such as hours of operation. Facilities' paper signs were often torn, aged, written on by pen, or had graffiti. CORE observers found multiple instances of signs either made out of duct tape or covered by duct tape.

On multiple occasions, CORE observers had great difficulty locating a service location. Observers found ineffective or non-existent internal and external signage. Signs directing customers to appropriate lines or services were often missing or incorrect, and many sites lacked an obvious reception or information desk. Closed locations often lacked instructional signs or contact information.

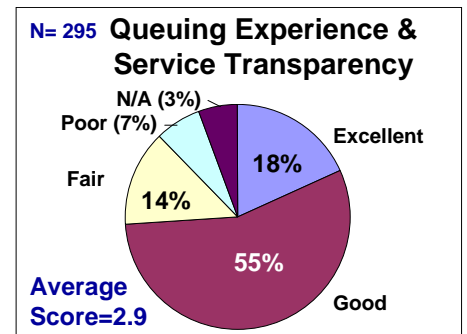


## 3. Queuing Experience & Service Transparency

*Improvements in queuing at agency walk-in facilities would enhance the customer experience*

Overall, many facilities have implemented appropriate processes to manage customer volume. For example, facilities used technology to provide information to customers regarding wait-time and routing (e.g., Q-Matic), or ensured customers could speak with a staff member within a reasonable amount of time (typically ten minutes or less).

At many locations, however, it was difficult to determine the appropriate line for a customer to join, an estimate of overall wait time, or the steps that should be followed to complete a service. Twenty-nine percent of locations did not have a greeter to review customer issues upon entry or a staff member who could answer questions or provide direction. Most sites declined to provide a wait time to obtain a service, and several advised customers to reserve up to a full day for the completion of their business. In addition, access to applications or simple requests often required a wait.



Walk-in facilities used security guards for a multitude of non-security purposes, and most prominently to direct customers. Staff was available to greet customers at 71% of sites, however in the majority of locations a security guard acted as the greeter rather than customer service staff. Security guards' temperament, customer rapport and knowledge of agency services varied widely. In several locations, guards greeted customers, directed traffic, provided security and signed customers into the restrooms, among other tasks.



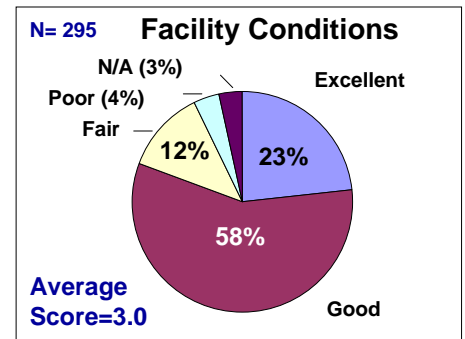
#### 4. Facility Conditions

While the majority of facilities were rated Good by observers, a significant number of maintenance issues were identified

Generally, facilities were considered acceptable by observers, with 69 locations (23.4%) rated Excellent. The average overall score for facilities was 3.0 on a 4.0 scale.

CORE observers noted that facility conditions, such as maintenance in common areas and graffiti, impacted their overall customer experience. Graffiti was the most commonly cited facility issue, with 49 facilities (16.5%) having some form of graffiti. Graffiti was most frequently located in customer bathrooms, building stairwells, and on doors, walls, and signs.

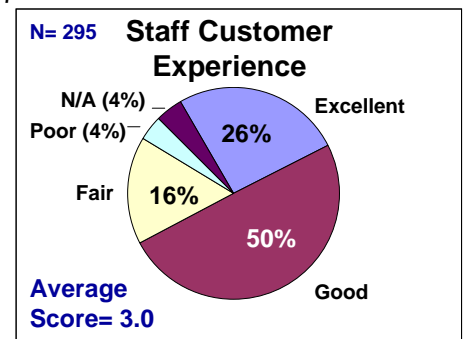
After graffiti, the facility issues most commonly cited were dirty or damaged walls (35 facilities or 11.9%) and dirty or damaged floors/carpeting (23 facilities or 7.8%). The condition of facility walls in particular was a strong indicator of overall facility conditions. Ten out of 11 facilities (91%) that received a rating of poor for overall facility conditions were found to have dirty walls. Problems with escalators, elevators, and air conditioning resulted in lower opinions of facility conditions. Duct tape was often used to repair objects in public areas, causing facilities to appear more distressed.



#### 5. Staff Customer Service

While most observers experienced good customer service from staff, there is still room for improvement

At most agencies, staff members were able to answer straight-forward questions about their principal services. CORE observers found that most customer service staff members were able to provide a response to their inquiries. That being said, negative impressions of customer service staff had multiple causes. For example, inconsistent treatment of CORE observers and/or other customers, generally discourteous service (rude, irritable or disinterested service staff), and the inability of staff to determine where to find an answer or reluctance to escalate the issue for a response were most commonly cited. In isolated incidents, customer service staff directed customers to a website to learn more about a program, even though they appeared to be fully aware of the program descriptions and requirements.



Oftentimes, staff members expected customers to know about the agency's services and processes. For example, misdirected questions were answered with confusion or irritation by staff, or customer questions met a dead end – without referral or an attempt to find an answer. Responses varied from, "call 311," to "sorry, we don't do that here."

#### Next Steps

Using the findings of the CORE program, the Customer Service Steering Committee and CSG will create standards that address the challenges discovered by CORE shoppers. Beginning in FY2009, customer service standards will be measured and published in the Mayor's Management Report (MMR). Agencies will be held accountable for meeting citywide goals and for prioritizing the five elements of good service on which the CORE program was based: providing language access to customers; ensuring locations are easy to find and navigate; allowing for efficient queuing and service delivery; keeping facilities in good repair; and utilizing staff that is well-trained in providing the best possible customer service.

Finally, CSG has created several short- and long-term projects to address citywide customer service-related resources for agencies. These projects include Language Access policy and plans, a standardized signage policy and plan, an enhanced 311 customer feedback process, prioritization of customer management technology and tools, and the development of an agency guide for providing high quality customer service.