Improving Customer Satisfaction in the Public Sector: Lessons from the Montgomery County Piccard Pilot

Center for the Study of Social Policy
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In Montgomery County, Maryland, a groundbreaking approach to providing public sector human services is underway. The County Department of Health and Human Services is using the same customer service principles and strategies that are key to success in the business world to assist local residents. An initial report on the County’s ambitious effort, this paper provides an overview of customer service strategies and activities implemented at the Piccard Service Center Pilot Project in its first three months of operation. It describes some of the issues and challenges that have surfaced and celebrates the initial accomplishments that Piccard customers report. The paper also outlines some of the next steps the Pilot must take to instill customer service in the culture of the organization, to re-focus staff toward satisfying those they serve, and most importantly to ensure that residents receive effective, high quality services.

I. An Integrated Customer Service Center

In Montgomery County, administration of health and human services programs is consolidated in a single county department, the Department of Health and Human Services (DHHS). In 2004, planning began for an integrated customer service pilot project — the first step toward the Department’s ultimate goal of integrated service delivery. The customer service pilot site is the Piccard Center, one of the county’s largest DHHS service centers. Each month, more than 2,200 residents come to the Piccard Center to apply for Food Stamps, Cash Assistance, Medical Assistance, or Emergency Services for Housing and Utility Support.

The DHHS Office of Planning Accountability and Customer Service worked closely with a planning team composed of representatives from all DHHS service areas. More than two years of planning went into the development and refinement of a new approach for serving DHHS customers.

Goals of the Pilot:

- More efficient, comprehensive access to services
- One-stop intake, screening and referral
- Open, positive customer experience
- Increased customer education, leading to enhanced decision making
- Culturally competent services to a diverse population
- Measurement of effectiveness, including impact on customer satisfaction

“Following a successful Pilot period we hope to continue the model and expand it to our other service sites throughout the County..... The new Integrated Customer Service Model is a beginning step in reaching our goal of integrated Service delivery.”

--- Uma Ahluwalia, Director
Department of Health and Human Services
Montgomery County, Maryland
The pilot began operations in January 2007. The Piccard Center intake office is open 7 days per week, from 8 a.m. to 7 p.m. The pilot operates Tuesday through Friday for 4 hours per day—8 a.m. to 12 p.m. During the remaining operating hours, services are delivered in the traditional way.

A primary component of the pilot is an integrated intake, screening, and referral process, consisting of four stages:

1. **Reception.** Designated customer service staff greets the customer, identifies the reason for the visit, signs customer into the database and queue, provides an application and general information.
2. **Triage.** Staff reviews application, conducts pre-eligibility screening, provides service and eligibility information, makes referrals to internal and external programs.
3. **Direct Service Delivery.** Income support services and emergency assistance are provided on-site. Referrals are made for other services within the Piccard DHHS campus or from outside providers.
4. **Follow-Up.** Follow-up with individual customers monitors completion of direct or referred services and customer satisfaction.

### II. Overview of Customer Satisfaction Strategies

An essential component of the Pilot is a new focus on customer satisfaction. Recognizing that this requires a fundamental shift for the organization, its staff and its customers, the planning team is developing a range of customer service strategies. Described below are activities and strategies implemented to date; these and others are in various stages of development.

#### A. Articulating the Mission: Customer Service Principles and Pledge

Customer satisfaction principles have been articulated in DHHS policy and strategic plans. A Customer Service Pledge spells out the Department’s objectives and the treatment that customers can expect. Each customer receives a written copy of the pledge when they enter the Piccard Center lobby, and it is posted on the waiting room wall.

#### B. Obtaining Customer Feedback

During planning and early implementation, customers’ experiences and suggestions have guided planners. Customer satisfaction feedback will be an ongoing gauge of the Pilot’s direction and success and will continue to inform Pilot planning and implementation.

**Pre-Pilot Customer Focus Groups**

Although turnout was low, three customer focus groups were held before Pilot start-up. Those who participated provided important information about their past treatment at the Center,
their customer service expectations, and their opinions of the Pilot’s customer service principles and pledge.

**Customer Satisfaction Surveys**

Customers of the Pilot will be asked to participate in customer satisfaction surveys following their initial visit to the Piccard Center. They may choose to complete a written survey onsite, complete the survey online, or participate in a phone survey. The survey instrument is being developed. In the meantime, customer service team members are documenting customer feedback—both complaints and general comments.

**C. Designated Staff: Customer Service Representatives**

Although customer service is the responsibility of all Piccard Center staff, customer service representatives (CSRs) provide a special connection to each individual entering the Center by offering friendly and personal assistance in the lobby and waiting room areas. Three staff positions created for the Pilot were filled by participants in the County’s Work Experience (TANF) program. As former customers themselves, the CSRs offer a valuable perspective. Prior to the Pilot start-up, the three CSRs voluntarily participated in an intensive training program that included information about all the programs under the DHHS umbrella and their eligibility criteria, information and referral training, Triage training and shadowing of Triage staff, and customer service training.

Responsibilities and actions of the CSRs include:

- Greeting each customer as he or she enters the service center lobby and asking how they can help.
- Confirming that customers are at the right office. If not, the CSRs direct them to the correct location and often provide MapQuest directions.
- Identifying new customers or customers returning for a new service and directing them to the Triage queue.
- Entering new customer information in the database.
- Assisting customers with oral and written language barriers. (One of the CSRs is multi-lingual.)
- Helping customers fill out applications.
- Making pre-appointment reminder phone calls to customers.
- Assisting the receptionist by letting workers know that customers are there for their appointments, making copies, etc.
- Assisting Triage staff as requested.
- Asking customers to complete the customer service survey and conducting the phone survey. Until the survey instrument is finalized, CSRs ask customers to submit written comments and document oral feedback.
D. Staff Training and Communication

Training has been an important mechanism for re-focusing existing staff on customer satisfaction as a new priority and for developing or strengthening their customer service skills. In addition, structured communication with staff has helped planners identify and respond to customer service challenges. While initial activities are important first steps, ongoing staff input, training and support will be critical to the Pilot’s success.

Pre-Project Focus Groups

Focus groups held with Piccard Center staff prior to the Pilot’s start-up explored staff attitudes, perspectives, and suggestions. Staff explored the meaning of quality service as it relates to the Center’s customers, provided feedback regarding the Center’s customer service principles and pledge, and recommended strategies for improving customer satisfaction. Staff described quality service in the following ways:

- Talking with customers and listening to their problems;
- Making sure that customers understand why they are asked to fill out a form and how the information will be used;
- Referring customers to other services and ensure their access to different workers;
- Seeing customers on time, promptly processing their applications, and quickly providing benefits;
- Balancing case management and human interaction;
- Treating customers as they would want to be treated.

Customer Service Training

All Piccard Center staff (77 workers) participated in a one-day customer service training session. The training was customized by adapting components of recognized customer service training curricula. During the highly interactive sessions, participants considered the characteristics and importance of effective customer service, assessed their own customer service skills, and identified strategies for improvement. Participant reviews were very positive.

E. Pilot Evaluation

The evaluation of the Piccard Pilot will assess customer satisfaction and operational attributes—the overall enhancement of customer service and general efficiencies. The evaluation will be conducted by Wade Bannister, Associate Director of Informatics at the Center for Health Information and Research at Arizona State University, in partnership with the Center for the Study of Social Policy. Customer focus groups and surveys will be used to compare customer service and satisfaction during pilot hours and non-pilot hours. Other methods for measuring and comparing wait times and the impact of Triage services are being explored.
III. Initial Findings and Lessons Learned

The Pilot has been in operation for only three months, and customer service strategies are in the very early stages of implementation. The challenges and issues of re-focusing a public sector service center are surfacing. Planners and staff are beginning to understand the effort that is required and to appreciate the potential impact, and these initial experiences are shaping plans for the future.

A. Staff: The Key to Customer Satisfaction

High performing companies recognize that frontline employees are the organization’s agents for customer satisfaction. The initial experience of the Piccard Pilot reinforces the importance of staff and the challenges of building staff capacity and customer service skills.

Staff Attitudes and Behaviors

Planners were surprised by the negative staff attitudes and depth of prejudice toward customers revealed in focus groups and training sessions. Some staff exhibited deeply-held biases and beliefs about the customers they serve. In both structured and informal work settings, some staff talked about customers in a very negative and demeaning way. They stated that customers are “not like other members of the community” and that many are trying to abuse the system.

Although, staff as a whole agreed with the Piccard Center principles and goals of customer satisfaction, they did not always accept responsibility for their part in satisfying customers. Some workers lacked accurate perceptions of their own behavior and customer service skills, and some failed to recognize the connection between their own attitudes and customers’ satisfaction.

Staff attitudes and actions began to shift after participation in customer service training. Three months after the pilot start-up, planners report that staff are more positive toward customers and that they are beginning to “embrace the project.”

The Impact of Staff Morale

In focus groups and training sessions, many staff attributed poor customer service to low staff morale, unfavorable working conditions, and their “poor treatment” as employees. Although some staff focused their frustrations on the customers, others blamed high caseloads and workloads for interfering with their ability to spend time interacting with customers. They commented that unrealistic demands are placed on them, that the focus is on the number of customers served, and that they must constantly rush through their time with customers. Some staff reported that DHHS does not treat

“Unless our needs are met, it is difficult to meet the needs of our customers.”
-- Piccard Center staff
them well as employees and that their needs are not being met. One focus group participant labeled staff as the agency’s “internal customers” whose needs must be met before those of clients.

Customer service research confirms that the way employees are treated by their management has a direct impact on the way those employees treat the businesses’ customers. Whether DHHS workers actually are being treated poorly or not, their feelings have a strong impact on customer service.

**Overcoming Resistance to Customer Service Representatives**

During the first two months of the pilot, there was unanticipated staff resistance to the new customer service representatives. Some staff made demeaning comments that reflected their opposition to working with former customers as part of the customer service team and their general prejudice toward customers. Some staff expressed concern about the CSRs’ access to confidential customer information; others described the CSRs’ treatment of customers as placating and coddling. Few reached out to include the CSRs as full partners and colleagues, and some workers expected the CSRs to do tasks they themselves did not want to do.

Gradually, staff attitudes have improved. The Customer Service Team (CSRs) recently reported that they no longer experience animosity from staff and that they feel more and more appreciated each day. Research is needed to identify the factors that contribute to this remarkable shift in opinion and behavior. Some possible factors are the personal benefits that workers experience as a result of the CSRs’ work, daily reinforcement of customer service priority and skills from supervisors and managers, customer service training, modeling provided by the Customer Service Team, and clear expectations communicated to staff from DHHS leaders.

**B. Customer Expectations and Initial Responses to the Pilot**

Research shows that customers’ expectations shape their ability to have an impact on service quality. In market economies, when customers recognize and expect high quality services, they are more likely to demand positive treatment or to seek out service providers that will treat them positively. Although customer expectations are unlikely to have the same impact in the public human services sector, well-informed and empowered customers are essential for development of quality assessment and improvement strategies.

Their focus group discussions and feedback to Customer Service Representatives indicate that Piccard Center customers have reasonable, even modest, expectations regarding their treatment. They described good quality customer service as:
“Good customer service means being treated the way you [the staff] would want to be treated.”

“This is an occupation that can burn you out. Maybe staff should rotate jobs. I appreciate that the job can get tiresome, but they must hold true to customer service.”

----Piccard Center customers

Customer complaints prior to the Pilot included long waits for appointments, language barriers for non-English speaking individuals, workers’ failure to return phone calls, lack of staff response to service and information needs, and discourteous treatment by staff. Although customers did complain about their treatment, they expressed surprising empathy for staff. Customers seemed to understand staff time constraints and were hopeful that workloads can be reduced in the future.

Since Pilot start-up, overall customer feedback regarding changes in customer service has been very positive. Some customers are reluctant to make written complaints because they fear staff retribution, and problems with long waits and delayed appointments still occur. However, customers greatly appreciate the CSRs and give them glowing reviews. Clearly, the personal assistance provided by the Customer Service Team is essential to the Pilot’s success.

“I used to be nervous, but with the change, I’m no longer nervous.”

“I was treated like a VIP.”

“It is more organized now.”

“It’s a pleasure to feel welcome. They [the CSRs] are doing a wonderful job. Please keep it up.”

----Piccard Center Customers

C. Engaging Unions as Partners

The local public employees union delayed start-up of the Piccard Pilot by filing an injunction that halted remodeling of the lobby and waiting room areas. A dispute developed regarding
the design of the receptionist’s area and whether a plexiglass barrier should be erected between the receptionist and the customers. Planners believed that the plexiglass was an unnecessary impediment to communication and that it signaled distrust and distance from customers. When the union obtained a legal injunction to ensure the plexiglass shield, the entire pilot was delayed. Planners conducted a customer survey and found that customers did not believe the plexiglass would hinder interaction. With the plexiglass in place, remodeling resumed.

In addition to opposing or supporting changes in the physical service environment, there are other ways that unions may or may not contribute to improved customer service in the public sector. Job descriptions may need to be revised, customer satisfaction may need to be considered as part of staff performance reviews, and other strategies may need to be developed to increase staff accountability to customers. These and other measures may require negotiation with unions, which have an important role in the culture of some public sector organizations.

One lesson of the Piccard Pilot experience is that unions must be engaged from the beginning as partners in customer service efforts. The union must see that they have a stake in improved customer service. They must be convinced that employees’ interests will benefit as customer satisfaction increases and that their job satisfaction will likely improve. Indeed, Canadian research has shown that public sector employees’ engagement both improves customer satisfaction and is improved by it.

IV. Directions for the Future: Changing Public Agency Culture

Even high-achieving corporations acknowledge that a customer satisfaction focus requires a fundamental change in organizational culture. For public bureaucracies, this shift is likely to involve even more drastic change and even greater challenges. The Piccard Pilot has taken the first steps to make customer service a priority, and already customers report better quality service and increased satisfaction. However, enormous work lies ahead. The Piccard Center and DHHS must apply customer satisfaction principles in practice, policy, staffing, and management strategies throughout the organization. Customer satisfaction must be embedded throughout the organization as a goal and expectation. The following issues are surfacing and will require attention as the Pilot develops.

Sustaining Progress and Momentum as the Leadership Team Changes. Stacy Rodgers, Manager of the Office of Planning, Accountability and Customer Service, recently left DHHS to take a position with the State of Maryland. She played a key role in developing and leading the customer service team and evaluation components of the Piccard Pilot. Becky Smith is managing day-to-day customer service operations, and other members of the leadership team have rallied to assume greater responsibilities. However, this vacancy is likely to strain staff capacity and leadership at a critical time in the Pilot’s implementation.
**Strong Top-Down Commitment.** Customer satisfaction as a priority and expectation of DHHS leaders and managers must be clearly communicated to staff. Direct and sustained leadership involvement will help overcome staff resistance to change, keep the Pilot on track, and ensure that it has the desired impact on customer service.

**Ongoing Training Supported by Supervision and Coaching.** Planners hope to integrate customer service training as part of the core training that new staff DHHS receive. In addition, ongoing supervision and coaching will be needed to help staff change deeply held prejudices, apply customer service principles, and hone their skills. To support frontline staff, supervisors in turn may need special training and assistance from administrators.

**Recognizing and Rewarding Staff Performance.** Piccard Center staff recommended that DHHS measure and reward staff performance and provide incentives for high quality customer service. Currently, personal recognition from the planning team and informal rewards reinforce positive staff behavior. However, formal incentives and accountability mechanisms will help to embed customer service in the organization. Strategies to consider for the future include incorporating customer service into human resources functions including recruitment and selection of staff, performance management, and professional development. In addition, staff needs formal ongoing opportunities for their views and suggestions to be heard.

**Continuous Improvement Loops.** Routinely monitoring customer satisfaction and using customer feedback to develop and fine tune strategies contributes to an ongoing system of improvement. Along with customer surveys, strategies such as secret shoppers and complaint resolution systems can provide an additional layer of oversight and response. Continuous research and improvement loops will both require and strengthen organizational capacity and commitment.