

Highlights

Why OCA Did This Study

In accordance with the Office of the City Auditor's Fiscal Year 2019 Audit Work Plan, we conducted a performance audit of the Public Utilities Department (PUD) Customer Service Office (CSD) Customer Support Section (Call Center). The overall objective of this audit was to determine the efficiency and effectiveness of the Call Center—call wait times and customer service.

What OCA Recommends

OCA made six recommendations to improve Call Center operations and customer service. We recommend that CSD:

- Develop a plan to maximize the use of its chosen call system by acquiring a subject matter expert that can provide operational and technical assistance;
- Develop policies and procedures on the use of the call system to facilitate knowledge transfer to system users;
- Develop key performance indicators (KPIs), continually assess progress towards meeting goals, and communicate performance expectations to staff;
- Develop written guidance to standardize entry of call activities;
- Review authorization levels to provide Customer Service Representatives with the proper authority to efficiently respond to customer inquiries; and
- Provide training on technical and soft skills to Call Center staff and develop written guidance on internal and external communications regarding customer account activity.

For more information, contact the Office of the City Auditor at (619) 533-3165 or cityauditor@sandiego.gov.

Performance Audit of the Public Utilities Department Customer Support Division Customer Service Office (Call Center)

The Call Center Can Enhance Customer Experience and Internal Operations by Using Call Center Technology, Clearly Defining Performance Metrics, Increasing Representative Autonomy and Training, and Improving Internal Communications

What OCA Found

The City of San Diego (City) places great emphasis on delivering high quality customer service to all customers. The Public Utilities Department (PUD) Customer Support Division (CSD) Customer Service Office (Call Center) provides customer service to the City's water and wastewater customers.



Every call that comes into PUD's Call Center is a data point that can provide information on customer needs and customer satisfaction. As discussed in [Finding 1](#), we found that PUD is not leveraging its Call Center software. Specifically, PUD uses only approximately half of the available products to varying degrees, has limited policies and procedures, and has not provided ongoing staff training to safeguard system knowledge for future users.

Call centers are the focal point of customer interactions. Therefore, to ensure that internal operations are designed to meet service level expectations and that interactions with customers are professional and responsive, clearly established performance goals for both the Call Center and its Customer Service Representatives (CSRs) is imperative. As discussed in [Finding 2](#), we found that the Call Center does not consistently assess or have formal goals for key performance metrics. We also found that while the Call Center has metrics for CSRs, Senior CSRs, and Supervisors, these metrics are neither formal nor consistently applied. Lastly, we found that Call Center management does not effectively communicate Call Center expectations and feedback to CSRs regarding call quality.



The best call centers leverage people, process, and technology. As discussed in [Finding 3](#), we found that CSRs lack autonomy to address customer concerns and that CSD needs to provide guidance to staff on how to properly categorize the reasons for calls in the call system. We also found that CSD lacks communication between sections responsible for handling customer requests and cross-training is infrequent, although staff expressed a desire for it. These conditions create a highly reactive environment that ultimately impacts the Call Center's responsiveness to customers' needs.

