

2014

Executive Summary

Customer Service Signature Initiative

Customer Service Standards Reference Card

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HUD REGION IV CUSTOMER SERVICE PLAN

U.S. Department of Housing and Urban Development
HUD's mission is to create strong, sustainable, inclusive communities and quality, affordable homes for all.

September 2014





HUD REGION IV 2014 CUSTOMER SERVICE PLAN

I. EXECUTIVE SUMMARY

In accordance with the President's Executive Order 13571, Streamlining Service Delivery and Improving Customer Service, this new addendum to Region IV's Customer Service Plan, dated July 2012, serves to demonstrate compliance with that Executive Order. The attached initiatives supersede the existing plan adopted in 2008. It is designed to demonstrate Region IV's commitment to putting people first, utilizing advances in technology and service delivery systems to provide excellence in customer service. As of the effective date of this revised plan, local Customer Service Plans are no longer required. There is now a **Region IV Customer Service Signature Initiative** (Attachment I) implemented on behalf of all offices in Region IV in accordance with the Executive Order, which through Phase I, technologically serves our customers by the use of localized, uniform Customer Service web pages. Phase II will include the optional expanded use of the Customer Service web pages by those offices that choose to do so at which time they choose to do so.

All employees will continue to follow and act upon the Region IV Customer Service Plan Mission Statement, HUD Core Values, and Customer Service Standards contained within the Region IV Customer Service Plan. To reinforce the Region IV Customer Service Plan, employees will be provided with a **Region IV Customer Service Standards Motivational Reference Card** (Attachment II) that will be displayed in workspaces as a reminder of ways that customer service can be individually enhanced on a daily basis.

II. CUSTOMER SERVICE MISSION STATEMENT

The HUD employees of Region IV are committed to providing quality customer service to our customers, partners, and grantees. As we go about our daily activities, we strive to exemplify and promote the HUD Core Values and Customer Service Standards as we fulfill the Mission and Strategic Plan of the Department.

III. HUD CORE VALUES

- Accountability
- Efficiency and Effectiveness
- Fairness and Respect
- Integrity
- Teamwork

IV. HUD REGION IV CUSTOMER SERVICE STANDARDS

Customers/Partners Deserve Respect

- Every customer is entitled to courteous treatment.
- Every employee represents the Department.
- Display nameplates or wear nametags as appropriate.
- Identify yourself and your organization every time you have customer contact.
- Both internal and external voice mail greetings are professional. Greetings include information regarding extended absences and the expected date of return to the office.
- Provide a "real person" alternative to all voice-mail messages.
- Be available – limit the time that extensions are forwarded to voice mail (i.e., during absences, meetings, and breaks only).
- Don't drop the ball – direct correspondence and telephone calls to the correct party.
- When transferring a customer, take time to reassure that the other party is the appropriate contact and that they are not being transferred unnecessarily.
- After assisting a customer offer to provide additional assistance at a later time should the need arise.
- Strive to provide foreign-language alternatives and alternatives for persons with disabilities, when necessary.
- Reach out to customers – go to their place of business when possible; conduct regular conference calls.
- Offer to return the calls of customers who are calling long distance.
- Solicit feedback and react to customer comments.

Customers/Partners Deserve Quality Products

- Provide the appropriate information to a customer on the first call or letter and ensure that all questions are answered.
- Write in plain English, not technical or government jargon.
- Follow-up regularly to ensure that quality products are provided.
- Consider the needs of customers/partners when developing products and procedures.
- Include a contact name, organization, telephone number, and date on all correspondence.
- Include a contact name and telephone number for each program in published directories.
- Ensure that marketing materials are consistent throughout the office and that they are accurate/up-to-date.

Customers/Partners Deserve Timely Service

- Ensure adequate telephone coverage throughout the business day. As an alternative to voice mail, ensure that live persons are available to answer each Division's main telephone line, where appropriate.
- Respond to all telephone inquiries within 24 hours.
- Adhere to established time frames for responding to correspondence and requests for information. Provide an interim response when a complete response requires extra time for research or there is a heavy workload.

Customers/Partners Deserve Results

- Establish quantitative customer service goals and processing standards and incorporate them into performance standards and the HUD Region IV Customer Service Plan/Management Plan, where possible.
- Perform random supervisory control checks to ensure that quality customer service is provided.
- Provide basic program training to all staff, particularly those who deal with the public.
- Provide customer service training opportunities for all employees on a regular basis.
- Encourage teamwork so all staff are thoroughly informed of customer-service related issues.

ATTACHMENT I

HUD REGION IV CUSTOMER SERVICE SIGNATURE INITIATIVE

The Region IV Signature Initiative is developing uniform customer service pages for each office which contain common and/or frequently used toll-free phone numbers and information links; electronic Region IV Customer Service Feedback Mailbox to collect customer feedback; customer feedback links on webmail and office letterhead to electronically solicit and collect customer feedback; training for all Regional staff on use of social media; developing motivational tools (for internal use only) to reinforce the agency's commitment to excellence in customer service, and establishing a toll-free phone number for each Region IV Field Office.

Just as the Department fulfilled the requirements of the Executive Order by implementing two Service Initiatives to enhance customer service, Region IV is enhancing its plan to comply with the spirit of the Executive Order and expand the customer service experience for those seeking answers via the Web. Region IV's initiative will also benefit Region IV employees by freeing up more time for Customer Service and other HUD staff to address other customer service needs. Region IV's Initiative is a directed effort to better serve customers in order to achieve HUD's five strategic goals:

1. Strengthen the Nation's housing market to bolster the economy and protect consumers,
2. Meet the need for quality affordable rental homes,
3. Utilize housing as a platform for improving quality of life,
4. Build inclusive and sustainable communities free from discrimination, and
5. Transform the way HUD does business.

In particular, Region IV's initiative is closely tied to efforts in support of Strategic Goal 5 of HUD's Strategic Plan. As such, Region IV's customer service initiative, **Expediting Customer Web/electronic Inquiries**, addresses the desire to assist customers find answers to specific web inquiries and provide additional general information on a single page. The uniform Customer Service page will provide a uniform general index of subjects, all in one spot to meet many customer needs. The initial phase will address the top, most frequent inquiries and provide generic links and phone numbers to access an array of information on HUD programs. The main page will be consistent throughout all the Field Office web sites in Region IV. After establishing the initial uniform page, Field Offices will be encouraged to further customize their page with other popular and useful local links, as well as locally important phone numbers.

The new uniform customer service page will also include a link to customers to use to provide feedback on the usefulness of the page and convey any additional comments via a dedicated mail box accessible by clicking on a link located at the bottom of the customer service page.

The table and information below provide a summary of Region IV's signature initiative while addressing the actions required by the Executive Order. For continuity purposes, the format mirrors the Department's plan at

<http://portal.hud.gov/hudportal/documents/huddoc?id=CustServPlan11292011.pdf>.

Presidential Executive Order 13571, Streamlining Service Delivery and Improving Customer Service: <http://www.whitehouse.gov/the-press-office/2011/04/27/executive-order-streamlining-service-delivery-and-improving-customer-ser>

Localized Uniform Customer Service Web Pages to Enhance Customer Experience

Overview: Region IV's signature customer service initiative, Localized Uniform Customer Service Web Pages, addresses the desire to assist the customer in finding answers to specific web inquiries and provide additional general information on a single page. The purpose is to anticipate the inquiry by addressing the most frequent web information requests and providing general information on an array of subjects that might interest the customer. The overriding objective is to get the needed information to the customer quickly and immediately on an array of key subjects that might be of interest. The initial phase will address the most frequent web inquiries and provide generic links and phone numbers to information on HUD programs and other Federal programs that the Department is promoting. Typically, the popular inquiries deal with rental assistance, including Section 8, foreclosure prevention, HUD Homes for sale and access to Housing Counseling. The additional page will be consistent throughout all the Field Office web sites in Region IV.

Key Customer Groups:

- External Consumers
- HUD Customer Service Representatives

Challenges:

- Anticipating the frequent customer inquiries and providing relevant information to minimize the time needed to find a responsive answer to the query.
- Providing information on new initiatives on a timely, accurate and seamless basis.

Featured Actions:

- Having relevant information, both links and phone numbers, on one webpage to reduce the need for multiple searches. Ideally, this will reduce the frustration regarding the question of "Where do I start". This will allow the customer to be subject to many interrelated topics that, hopefully, answer the where to begin question.

Increase Feedback from Customers

- The new uniform Customer Service State pages will include a link to a dedicated mailbox for use to provide consumer comments and suggestions.
- If Customer Service Representatives assist a customer in real-time on the page, the consumer will be able to provide immediate feedback on the experience.

Adopt Best Practices for Improving Customer Experience

- Utilize constructive feedback based on the information obtained above and incorporate viable improvements.
- Explore other forms of social media to provide access to the site.

 **Set, Communicate and Use Customer Service Metrics and Standards**

- Metrics will be developed in collaboration with web managers to determine the usage and satisfaction of the Customer Service page.

 **Streamline Agency Processes to Reduce Costs and Accelerate Delivery**

- In addition to reducing the “Where do I start” conundrum, self-serving customers should reduce the demand on Customer Service Representatives, thereby enabling them to serve additional customers more timely and thoroughly.

 **Impacts and Benefits**

- The customer should be able to expedite their inquiry in a successful manner by having access to a variety of options on different, but potentially related, subjects that are of interest.
- Reduce the number of inquiries on popular requests to allow the Customer Service Representatives to assist more people.

 **Key Milestones and Timeline**

- Finalizing the design and structure of the page should be accomplished by September 30, 2012.
- Individual Field Office local additions would be added after the generic page roll-out.

ATTACHMENT II

HUD REGION IV CUSTOMER SERVICE STANDARDS MOTIVATIONAL CARD

Communicating Customer Service Standards

- Customer Service Standards Motivational Card for posting – it serves to communicate our customer service standards and enhance individual customer service delivery.

HUD REGION IV ONE REGION–ONE HUD CUSTOMER SERVICE INITIATIVE <b style="color: #00FF00; font-size: 1.2em;">We Put People First!	
Because We're the Best, We Do Our Best to Serve Our Customers By Asking:	
1. Do I answer the telephone, <b style="color: yellow;">“Good morning/afternoon, U.S. Department of Housing and Urban Development. This is _____ (your first or first and last name).” May I help you?	2. Do I use the web, social media, or other technology to enhance the customer service experience?
3. Do I always ask the customer, “Is there anything else that I may do to assist you today?”	4. Do I regularly use the “out of office” assistant on my email and voice mail to communicate my status and how customers can reach a live person?
5. Do I routinely return the call of a customer within 24 hours of receiving it?	6. Did I take the time to proactively share information with my customers/partners about other important HUD initiatives that could improve their experience and image of HUD?