

Customer Service Standards

NEW

B-830

Page 1 of 4

07/14/11

PURPOSE

Amended Substitute Senate Bill 2, 129th Ohio General Assembly (Ohio Revised Code Section 121.91), requires each state agency to develop customer service standards for each employee of the agency whose duties include a significant level of contact with the public. This policy sets forth customer service standards for all Ohio Department of Aging (ODA) employees.

POLICY

- A. For the purposes of this policy, and to ensure consistency in the application of this policy across ODA's workforce, the following definitions apply:
1. "Customer service" is the way ODA responds to needs and requests from the public or a member of the public.
 2. "Public" or "member of the public" includes both external and internal customers.
 3. "Customer" is any individual or group who has an interest in ODA's programs or operations. "Internal customers" include all ODA employees at every level of the agency.
- B. ODA employees shall make it a priority to anticipate and address customer needs and provide effective, resourceful, efficient, friendly and caring service while inspiring the highest level of customer trust and satisfaction.
- C. All ODA customers, regardless of method of contact (in person; by phone; or in writing, including mail and E-mail), must be treated with the utmost respect. This also applies when a customer communicates with an ODA employee who may not be the appropriate ODA employee to adequately assist the customer. An honest effort must always be given to assist a customer, either directly or through a polite referral to a more appropriate ODA employee.
- D. The "Procedures" section below provides *general* procedures that all ODA employees will follow. Nothing in this policy precludes ODA division chiefs from adding additional customer service standards and procedures within their respective divisions. Additionally, ODA has the right to directly evaluate and/or develop evaluation methods to monitor the quality of customer service being provided within individual divisions and across the agency. The purpose of such evaluations and evaluation methods is to ensure continuous quality improvement of ODA's customer service.

- E. Any employee failing to follow the customer service standards and procedures outlined in this policy and/or any additional division-specific customer service standards and procedures may be subject to discipline up to and including removal. Please refer to ODA policy C-700 *Standards of Behavior* for more information.
- F. Enforcement of the customer service standards and procedures set in this policy is the responsibility of each division chief. Division chiefs shall consult with the Human Resources Division (HRD) chief or his/her designee if enforcement of this policy becomes necessary.
- G. ORC Section 121.91 also requires each state agency to incorporate customer service standards into employee job descriptions and employee performance evaluations. HRD will take all necessary steps to implement these requirements.

PROCEDURES

- A. During interactions with ODA staff, customers will:
1. Be acknowledged appropriately;
 2. Be treated courteously and respectfully;
 3. Be valued for their requests, questions and input;
 4. Receive the same high standards of service, regardless of race, color, religion, sex (including sexual orientation and gender identity), national origin, disability, age, veteran status, military status or genetic information (Genetic Information Nondiscrimination Act of 2008, i.e., "GINA"); and
 5. Receive prompt and timely service as the situation merits.
- B. Customers must be greeted over the telephone or in person with a friendly "hello" or similar pleasant and welcoming greeting. ODA employees shall also identify themselves by name and division to telephone customers. *Example: "Hello, this is Jane Doe in the Human Resources Division."* Additionally, each ODA employee's outgoing voicemail greeting should identify the employee by name and division.
- C. Every effort must be made to help ODA customers, politely and professionally, with their requests. If the ODA employee communicating with a customer is not the appropriate person to help the customer with the request or with the information the customer is seeking, the ODA employee shall politely inform the customer that he/she will be transferred or referred to another person who can help the customer. The ODA employee making such a referral

shall provide to the ODA customer the name of the person the customer will be referred to, before the referral is made (e.g., before transferring a telephone call).

- D. If a customer's request cannot be fulfilled by ODA staff (e.g., when the customer's request should go to a different agency or organization), the ODA employee responding to the customer shall politely inform the customer that such services cannot be performed by ODA. Whenever possible in this type of situation, the ODA employee shall suggest alternative sources of information to the customer and shall provide the customer with as much information as possible (e.g., the name of the other organization, telephone number, website address, etc.).
- E. Constituent inquiries will be resolved in ten (10) business days or less. Refer to ODA policy B-910 *Constituent Inquiry Process* for additional information about constituent inquiries.
- F. Telephone calls, voicemail messages and E-mail messages from external customers that are outside of ODA's formal Constituent Inquiry Process shall be acknowledged (to the customer) within two (2) business days, except in unusual circumstances when such an acknowledgment is not possible. Every attempt must be made to fulfill a customer's request or answer a customer's questions as soon as reasonably possible.
- G. **Important notes regarding public records requests and requests from members of the media:**
1. Public records requests must be forwarded immediately to ODA's chief legal counsel or his/her designee. If an ODA employee receives a public records request, the ODA employee shall follow the standards established in this policy regarding polite and friendly customer service, but shall also follow the guidelines in ODA's B-820 *Public Records and the Release of Information* policy.
 2. Please also refer to ODA's B-900 *Media Relations* policy for proper handling of media inquiries. The Communications Division Chief, or his/her designee, has primary responsibility for media relations.
- H. Complaints about an employee's customer service shall be referred to the employee's immediate supervisor and/or division chief for follow-up and resolution. A division chief, at his/her discretion, may contact the HRD chief or his/her designee for assistance.
- I. In addition to the policy and procedures outlined above, the following is a list of a few suggested tips or "best practices" that can help ODA employees to go "over and above" when it comes to providing quality customer service to the agency's customers. This is not an all-inclusive list; ODA division chiefs are encouraged to implement additional procedures, tips and practices in their respective divisions in order to better meet customers' needs.

NEW	B-830
Page 4 of 4	07/14/11

1. Try to be aware of any special needs of the customer(s) being served. For example, some customer(s) may be better served by speaking to them slowly and/or louder than you might normally speak. Give the customer(s) time to respond to any follow-up questions you ask of them. Ask if he/she needs to write down pertinent information and if he/she needs anything repeated.
2. Try to be aware of situations in which a customer has already been transferred multiple times. (i.e., over the phone). In such a situation, rather than transferring the customer/call again, it may be more appropriate to take down the customer's name and phone number and advise that someone will call him/her back. Then, call the more appropriate ODA staff member or outside party, provide the customer's information to them and request that they call the customer. Follow up with the customer the following day to find out if he/she received a phone call from the other party. If the customer didn't, follow up with the other party again.
3. Examples of acknowledging a customer appropriately (see procedure A1 above) may include, but are not limited to, greeting customers with a smile, welcoming them with a "good morning" or "good afternoon," offering assistance by saying "how can I help you?," etc. Try to gauge the mood of the customer and greet the customer positively.
4. ODA employees who will be out of the office for one full day or more should update their outgoing voicemail message and program an automatic out-of-office E-mail reply in Outlook. These messages should include the employee's approximate date of return and a contact telephone number (e.g., the main phone line of the employee's division) so that the customer is able to receive assistance from another employee.

References:

- Amended Substitute House Bill 2, 129th General Assembly
- Ohio Revised Code Section 121.91

Presented to Executive Staff for review on July 5, 2011.

Adopted: _____
Bonnie Kantor-Burman, Director

Date