



Customer Service

A collaborative project with the Finance Department

Office of the City Auditor

Description of Project

Why we did this project

Internal Auditing requested to participate with a Finance Department project to better understand the department's initiative to provide excellent customer service. The goal of the project we worked on was to help improve internal customer service by understanding customer needs related to the purchasing process and delivering services to meet those needs.

How we did this project

- **Select project methodology**

The team chose the Civic Service Design methodology for the project. The steps for this methodology include Set the Stage, Talk with People, Connect the Dots, Try Things Out and Focus on Impact. The first actions taken using the Civic Service Design model were to conduct surveys and focus groups to determine knowledge gaps on key purchasing processes.

- **Customer survey and focus groups**

A survey was sent out to all originators and approvers asking questions about their purchasing duties and their understanding of the process. The team received 86 completed surveys to analyze.

The team then sent out invitations to originators and approvers to participate in focus group discussions. Small group discussions were set up with 36 employees to facilitate open and honest conversation about the participants' expectations and understanding of the purchasing process.

- **Identify themes from customer feedback**

Using the information gained from the surveys and the focus groups, the team was able to create themes that were important and discussed throughout. Some of the themes included:

- ▶ Purchasing documents do not exist in simple form and cannot be easily located
- ▶ Originators and approvers need more training
- ▶ Timeliness of requisitions and communication issues between Purchasing employees and originators
- ▶ Insufficient Munis training
- ▶ Staffing issues in the Purchasing Division
- ▶ Training on how to write specifications
- ▶ Desire for limit increases in the purchasing ordinance

After reviewing each of the themes the team chose to focus on training as it would have the largest impact on problems the users were having.

Results

The team asked Larry Hood, Purchasing Agent, to lead the training. We decided to start with training to help employees understand the purchasing ordinance, with Munis and specifications training to be conducted separately at a later time. With Larry's direction, a training presentation was developed that addressed points that were brought up in the surveys and focus groups, along with other important areas Larry identified. Actual purchasing examples were included so participants could discuss situations they had encountered in the past.

In January, two pilot training classes were given to small groups of employees to encourage discussion. The group completed a survey prior to taking the class and then again after the class was completed. The survey was designed to help the team gauge participants' increase in understanding of the purchasing process. The survey also asked participants to make suggestions for future training. Overall, the surveys showed the training was successful in improving participants' understanding of the purchasing process. The next steps include offering ongoing training on the purchasing process, Munis training and specification writing training.

The team presented project findings and recommendations during a staff meeting that all Finance Department employees attended. Other Finance Department teams also presented their project results at this meeting.