

IACA 2008 - SALT LAKE CITY

UNITING LOCAL AND GLOBAL PERSPECTIVES

Merit Award Application and Criteria

Completed applications must be received by: March 15, 2008

Send completed application to: **Randy Moes**
1019 Brazos, Suite 505
Austin, TX 78701

Criteria:

1. Any technology project initiated by the filing office that improved the efficiency of the office, service to the customer or otherwise benefited the office; or
2. Any innovative changes in your office that have been implemented that have allowed the office to continue or increase its efficiency.
3. Only those projects that have not been previously selected for recognition and which are presently in operation may be nominated (projects which are planned or currently under development are not eligible)
4. Application must be accompanied by a separate detailed description of the project or innovation and must demonstrate how it has enhanced your office. Award recipients will be given 10 minutes at the 2008 IACA Conference to present their project.
5. While specific content of the submission is not mandated, project should include; an introduction to the project, description of the project, results of implementation, cost-benefit of project and lessons learned.

Jurisdiction: _____ Michigan _____

Submitted by: _____ Tracy Goss _____

Date Submitted: _____ 3/14/08 _____

Brief Description: Staff training to handle phone calls received that are for divisions, agencies or departments other than the Corporation Division.

Detailed Description:

In the Corporation Division, calls are received daily that are for other divisions within the Bureau of Commercial Services, other agencies within the Department, or even other areas of state or federal government. Sometimes the call is from a customer that was unsure of where to call in State government, or sometimes that call is transferred to our Division from another agency or the state operator.

Corporation Division staff received additional training and were provided resources in 2007 in order to better handle these types of calls. This training was consistent with the Department's increased emphasis and focus on customer service. The training has allowed staff to provide more detailed information to customers and when necessary, transfer calls to the appropriate area of government.

The Bureau of Commercial Services consists of three divisions: Corporation, Licensing, and Enforcement.

Step One of the training was to provide additional information for all Division staff regarding the other Divisions and their specific functions within the Bureau. Detailed phone lists were provided to staff related to functions of the Licensing Division, including where to transfer a call depending on what type of license for which the customer was seeking information. Similar resources were provided regarding Enforcement functions and where to transfer specific calls for Enforcement issues. A file was created that could be easily saved on each person's PC desktop for quick, easy reference. The overall goal was to ensure Corporation Staff was more familiar with the other Bureau functions to avoid issues of not knowing where a call should be routed, especially if the call was for another area of the Bureau.

Step Two of the training was to designate a single person (with back-ups) within the Division to research questions asked by customers that fall outside of the Bureau, Department, or even sometimes state government. A procedure was developed so that when one of these calls is received, the staff person receiving the call contacts the designated person whom we can call "subject matter expert" for this purpose. If the subject matter expert readily knows the answer to the question, the information is immediately provided and relayed back to the customer, sometimes via a three way call so that the other staff person and the customer can both hear the answer.

If the question requires further research, the subject matter expert will research the question and contact the customer within 24 hours with answers or other resources for the customer. Finally, a spreadsheet for these types of calls was created and stored on a central drive that can be accessed by all staff. The spreadsheet is a log of these calls, the type of question asked, and the resources (usually web site addresses or phone numbers)

provided to the customer, i.e. how the question was answered or the issue resolved. This allows staff on future calls of this nature to first refer to the spreadsheet to see if the call is something that has been asked previously and then staff can readily provide the information from the spreadsheet rather than having to ask for assistance with the call.

Cost-Benefit:

1. No additional costs or programs created. The only cost involved was minimal staff time involved creating training materials and the time spent updating staff with the information.
2. Customer goodwill, positive view of State Government – Customers are always very appreciative of that fact that someone took the extra time to help with their particular issue and they that did not hear statements such as “that’s not my area” or “I don’t know the answer, check with the State Operator”. With the available resources, especially on the Internet, the time required of the subject matter expert is minimal as measured against the good will created and results obtained for the customer.

Lessons Learned:

1. Staff input very important – In the process of making sure staff had available resources at hand to answer questions, it was the staff input that helped to identify areas where they were unable to answer a question or were not sure where the question should be directed. In some cases, staff with years of experience happened to know many answers outside of the Division functions. However, newer staff members have not yet acquired that type of knowledge and the additional training and resources helped to empower them in working with customers.
2. Sometimes the smallest or slightest change of a procedure can help maximize efficiency in the agency operation or provision of services. As we are all continually asked to do more with less, the customers appreciate the effort of our staff even though what we do in the Division may be totally unrelated to the question asked.

**Awards will be presented at the 2008 IACA Conference.
Award recipients should be prepared to give a brief
presentation (approximately 10 minutes) about their project.**