



DISTRICT OF COLUMBIA GOVERNMENT OFFICE OF RISK MANAGEMENT

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Chief Risk Officer

D.C. OFFICE OF RISK MANAGEMENT **ADMINISTRATIVE ISSUANCE SYSTEM**

Administrative Order No. AO-11-04

Date: May 31, 2011

SUBJECT: Customer Service Standards – D.C. Office of Risk Management

ORIGINATOR: Phillip A. Lattimore, III, Chief Risk Officer/ Director

DISTRIBUTION: All ORM Employees and contractors

EXPIRATION DATE: Until Superseded or Rescinded

1. Purpose

The purpose of this D.C. Office of Risk Management (ORM) Administrative Order (Order) is to set forth this agency's policy, practice and protocol concerning minimum customer service and quality assurance standards for telephones, voicemail and face-to-face interactions involving all ORM business transactions.

2. Applicability

Until further modified or rescinded, this Order applies to all ORM employees.

3. Policies

a. Telephone Standards

- (1) **Basic Knowledge:** All ORM employees are expected to have a basic understanding of the primary functions of ORM. The employee should also have a basic knowledge of District services (i.e. 311, 911, Answers Please, website address, and main agency numbers).

- (2) **Telephone Etiquette:** Each telephone call should be handled with the highest level of customer service by all ORM employees by:
 - (a) Answering calls within 3 rings;
 - (b) Asking to put the caller on hold and waiting for the response;
 - (c) Checking back with customers frequently when placed on hold;
 - (d) Providing options for resolution;
 - (e) Being professional, courteous and pleasant; and
 - (f) Providing reference information when transferring calls.

- (3) **Courtesy:** Each caller to ORM should be treated with the highest level of customer service by all ORM employees by refraining from:
 - (a) Using speakerphones;
 - (b) Eating or chewing gum while speaking with a caller;
 - (c) Having secondary conversations with individuals other than caller while caller is on the phone;
 - (d) Rudeness; and
 - (e) Confrontation.

- (4) **Salutation:** State name and agency, and solicit information. At the end of the conversation, thank the caller for calling.

- (5) **Returning Telephone Calls:** Calls should be returned within 24 hours of receipt or within the next business day.

- (6) **Receiving Transferred Calls:** All ORM employees are expected to take transferred calls from telephone call distribution points (i.e., Mayor's Call Center, ORM receptionist). An employee should minimize the number of times a caller is transferred to resolve an issue by taking a message and distributing it to the appropriate staff person for resolution. The goal is one transfer per constituent and the transfer should be to another person, not voicemail. If the call is inappropriately transferred to you, take down the caller's information and have the appropriate individual return the telephone call.

b. Voicemail Standards

- (1) **Desk Telephone Standard Greetings:** Every telephone equipped with voicemail should have a standard outgoing greeting that is professional, concise, and conveys relevant and useful information to the caller. Each desk phone greeting should include the following information:
 - (a) Name of employee, title of employee, organizational unit of employee, phone number to dial for immediate assistance; and
 - (b) Statement that calls will be returned within 24 hours or the next business day.

- (2) **Extended Absence Greeting:** Every employee who will be out of the office for more than two business days should record an extended absence greeting. In addition to the desk telephone standard greetings, this greeting should outline the expected date of return or forward all calls to an employee in the office.
- (3) **Voicemail Boxes:** All employee voice mailboxes should be set-up and ready to accept voice messages. Voice mailboxes should never be full and unable to accept new messages.

c. Correspondence Standards

- (1) **Acknowledgement:** Correspondence that requires action or requests information from the agency should be acknowledged or responded to within 2 business days. This acknowledgement is necessary to manage requestor's expectations and to make them aware that the ORM has received the request and is working to resolve it. The acknowledgement should contain the following:
 - (a) Realistic timeframe for issue-resolution;
 - (b) Contact person's name, telephone number, and email address; and
 - (c) Tracking/identification number for requestor to follow up.
- (2) **Provide Resolution/Fulfill Request:** All correspondence should be appropriately resolved by the agency within the articulated timeframe. Responses should address all issues raised within the initial correspondence and be free from grammatical and spelling errors.
- (3) **Email Reply:** Unless otherwise indicated by the originator, it is suitable to respond to constituent requests via email. Email may be used as official correspondence and is a reflection of the agency and government. Should an employee choose to email, the email at a minimum must:
 - (a) Be edited to ensure that the message conveys appropriate information and it is free from grammatical and spelling errors;
 - (b) Provide appropriate signature line to include name, title, agency/department, email address, phone, and fax; and
 - (c) Be professional.
- (4) **Individual Employee Responsibility:** If correspondence is addressed directly to an individual employee, it is the responsibility of that employee to:
 - (a) Assume personal responsibility to respond to and resolve any correspondence addressed to the employee and, if necessary, direct correspondence throughout the agency or to another agency for resolution;
 - (b) Follow the acknowledgement standards outlined above; and

- (c) Keep a record of the individual correspondence when the correspondence requests agency services or information.
- (5) **Out-of-the-Office Auto-response:** If an employee will be out of the office for more than two business days it is the employee's responsibility to have an out-of-the-office, auto-response email describing:
 - (a) The employee's absence from the office;
 - (b) The expected return date;
 - (c) When the employee will respond to the inquiry; and
 - (d) Where the writer can call or email for immediate assistance.

d. Face-to-Face Standards

- (1) **Customer Interaction:** Customers should be handled with the highest level of customer service by all ORM employees. Employees are expected to adhere to all aspects the following standards:
 - (a) No chewing gum or eating while interacting with customers;
 - (b) No secondary conversations or interactions contrary to the agency function should be conducted within the servicing environment while customers are present;
 - (c) Be prepared and available to assist customers;
 - (d) Listen carefully to customer and take notes if necessary;
 - (e) Ask appropriate follow-up questions to verify understanding;
 - (f) Use a customer-friendly tone;
 - (g) Keep customers informed of the progress on their issue to proactively manage their expectations; and
 - (h) Avoid confrontation.
- (2) **Language Accommodation:** Employees should contact the Office of Human Rights at (202) 727-4559 or visit <http://ohr.dc.gov> for assistance with accommodating individuals who need assistance in languages other than English.
- (3) **Disabilities Accommodation:** Employees should contact the Office of Disability Rights, (202) 724-5055, <http://odr.dc.gov> for assistance with accommodating individuals with disabilities.

4. Questions

Any questions or issues concerning this Order should be addressed by the appropriate ORM manager or supervisor. In addition, staff should refer to ORM's Customer Service Operations Handbook.

5. Effective Date

This Order shall be effective on May 31, 2011

Acknowledgment Form

I acknowledge that I have received a copy and reviewed ORM's Administrative Order No. 11-04, dated May 31, 2011.

I understand that I should direct any questions regarding this ORM Administrative Order to my immediate supervisor, or to the General Counsel within ORM.

Employee's Printed Name

Employee's Signature

Date

Distribution:

Copy to Employee; Copy to Agency Human Resources Advisor