City of Pearland Utility Billing Cultural Documents

This packet of information is meant to give an overview of some of the progress made by staff in the last year toward intentionally building culture in Utility Billing. This information was compiled for the Utility Billing Ad Hoc Committee upon request from members for discussion at the February 4th meeting.

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City of Pearland Culture brief

High Performance Organization (HPO) – a culture that creates and encourages leadership at all levels by making the **Mission** and **Vision** clear, understanding what our stakeholders' value and working towards providing that through aligned behaviors (**Values and Leadership Philosophy**), sound systems and processes and clear measurable objectives

Core Values – a principle that guides an organizations internal conduct as well as its relationship with the external world; Answers "How do we treat each other and our partners; beneficiary chain, food chain, and other stakeholders?"

> **We are committed to a purpose greater than ourselves. What we do makes a positive difference and leaves a proud legacy. *We serve* together through these values:**
> **Trust:** We build trust by providing excellent service, honoring it through accountability and effective communication.
> **Respect:** We act with kindness and empathy; embracing diversity and inclusion.
> **Integrity:** We are honest, ethical and do the right things for the right reasons.
> **Teamwork:** We are a caring workplace made up of a team working towards a shared purpose. We collaborate and support each other.
> **Ownership:** This is our city, we are invested and dedicated to its continuous success. We take pride in all we do.
> **Innovation:** We are progressive thinkers who embrace the challenge of continuous improvement

Vision - What are we trying to accomplish; what is our desired Future state? Provide direction to the organization

> **We will be a high-performance organization focused on continuous improvement and innovation, aspiring to build an engaging, sustainable, and inclusive community of choice.**

Mission – a statement that describes the purpose of the organization and what it does

> **To deliver unparalleled city services and responsibly manage our resources holistically to contribute to a safe and desirable Pearland community.**

Leadership Philosophy – describes the beliefs of the organization and what it does; "States beliefs about the nature of people in the organization and their attitudes toward work, what makes people choose to be motivated, the distribution on knowledge and creativity (and therefore how we choose to make decisions) and how work is defined "

> **Through driven employees who are diverse in experience, background, ideas, and knowledge, we fulfill a higher purpose by providing quality service to the community and organization.**

> **We acknowledge true leadership means taking responsibility for the overall success of our organization and it is incumbent on each us of to earn the confidence of the community through our actions every day.**
> **Our organization is comprised of knowledgeable and innovative employees who are trusted to lead from where they stand and are empowered to collaboratively act to serve the City through sound decision-making.**
> **What we do makes a positive difference and leaves a proud legacy.**

Rules to Work By

John McCarter
Interim Director of Finance

The purpose of these "Rules to Work By" is to establish a baseline of how employees will operate while at work. This list will be ever-evolving as we learn and grow as a group. Make sure you know these rules well and are actively using them every day. Together, we will intentionally build a culture of success in Finance.

1. Always operate with integrity
   a. **Definition**: the quality of being **honest** and having strong moral **principles**; **moral uprightness**.
   b. Finance Employees will always seek to **do things the right way**, regardless of the circumstance.
2. Manage yourself and your time
   a. Take care of yourself, especially during stressful times.
      a. Take advantage of **Employee Assistance Program** **and** **other benefits**.
   b. Be **self-directed** and **thorough** in your work.
   c. Take **responsibility** to make sure *you* get the information you need to do your job.
3. Be tactful and respectful in how you interact with your co-workers.
   a. Always treat others with **respect**, whether they do the same or not.
   b. When inevitably dealing with inter-personal issues, keep the focus on the structures and systems driving issue; not on the person/people involved.
   c. **Time is our most valuable resource**; make good use of other peoples' time.
   d. Never engage in gossip or hurtful talk with or about anyone at work.
4. Get smarter by asking stupid questions

a. If you need help, ask for it. If something doesn't make sense, **push for clarification** until it does. If something is not right, **work to get it fixed**.

b. **Always be learning**, even about things that are not directly related to you job.

c. Your role is **one piece of a larger system**. Understanding the system will help you better understand your role.

5. Find solutions – not answers

a. An answer is a specific response to a specific question. It may appease the situation at hand but it doesn't solve the root problem.

b. A **solution** to a problem should:

    a. Supply reasons, explanations or other notes to **clarify** the issue at hand;

    b. Demonstrate **understanding** of the contributing **methods, systems** and **processes**;

    c. **Communicate** what has been done and why; and

    d. Address the root issue(s) and provide a **long-term fix**.

c. Do not use precedent as a reason to continue to do something a certain way.

d. Seek out **collaboration** from individuals across the organization. Leverage others' unique skills and perspectives to learn and get better at what you do.

e. Make time to *think*, not just *do*.

6. Develop a relationship with the people you work with.

a. Periodically set times to meet in person.

b. Be **proactive** in ensuring that your colleagues **have what they need to be successful** to be successful.

Feedback on these items is encouraged. Submit your ideas to the Director of Finance.

Finance Department Employee Engagement Metrics

Note to Ad Hoc Committee: The Finance Department holds periodic "All Heads" meetings virtually after-hours in which all staff are updated on what is going on in the department and a short professional development topic is covered. We have talked about systems thinking, customer service and decision-making bias, among others. At the close of the session, staff are polled on six Employee Engagement Factors, which come from Gallup.

June 2020 Results
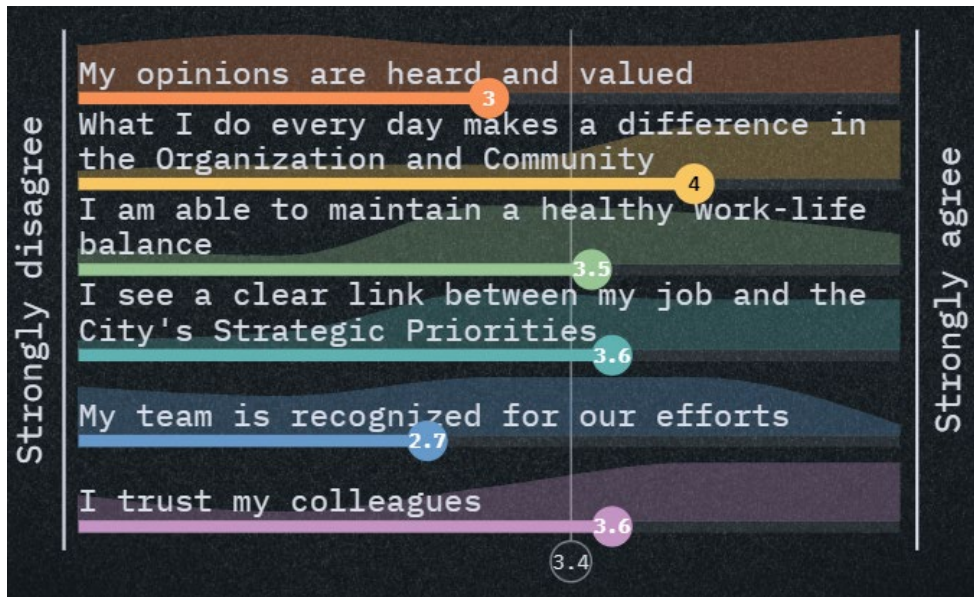
November 2020 Results (Most Recent)
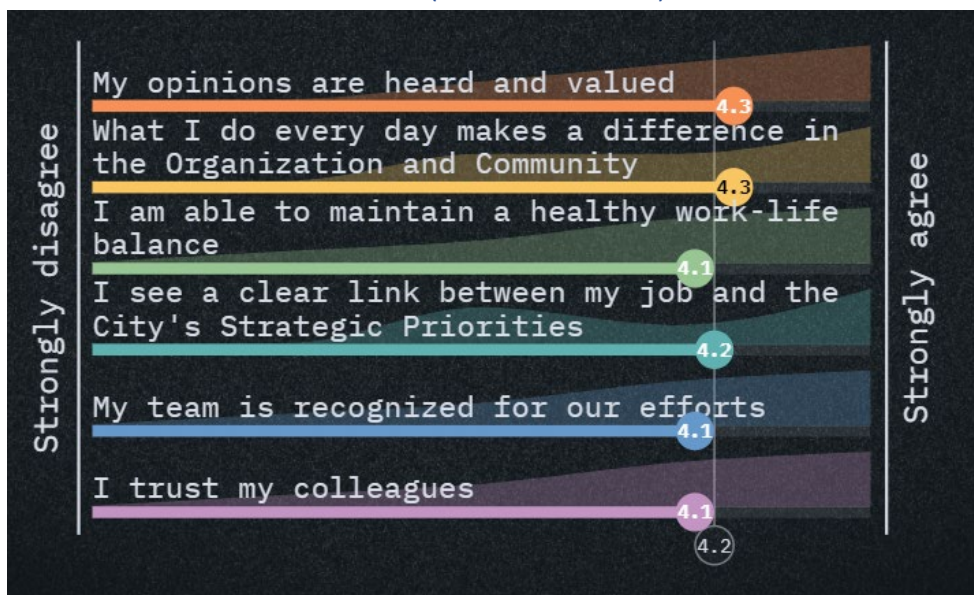
Note to Committee: This is an example of periodic "Refresher" trainings hosted by Utility Billing Management Staff. These typically occur monthly and include staff from all Utility Billing divisions. This training was held on November 4th, led by the City's Customer Service Supervisor.

Customer Service

CUSTOMERS FIRST

How to provide great customer service?

Listen	Listen to customer
Respect	Respect the customer
Do not	Do not listen to respond.
Do	Be professional and stay calm
Solution	Provide a solution

Tips to provide great service customer

Listen to customer

When helping a customer always try to understand their problem from their point of view.

Do not interrupt a customer, let them finish venting before speaking.

Write down all the information that the customer is giving you to better help your research.

1. VERIFY THE CUSTOMERS INFORMATION WHEN DISCUSSING THEIR ACCOUNT.

2. CALL THE CUSTOMER BY THEIR NAME.

3. CREATE A BOND WITH YOUR CUSTOMER.

4. RESPOND PROMPTLY AND KEEP YOUR PROMISES.

Respect the customer

Do not listen to respond.

1. Do not listen to respond. Focus on the true concerns of the customer.

2. Your tone of voice is a big part of customer service.

3. Never allude the customer into thinking the issue is their fault. This can upset the customer even more.
In regards to a high usage bill, inform the customers of a meter profile. Offer to provide them the option to receive their most recent reads within the last forty days. Be customer centric! Show compassion, understanding and provide solutions!

4. Remember, a customer's concern is about their account. Do not take their frustrations personal.

YOUR RESPONSE AND ATTENTION ARE IMPORTANT

Be professional and stay calm

When a customer is angry, do not take it personal.
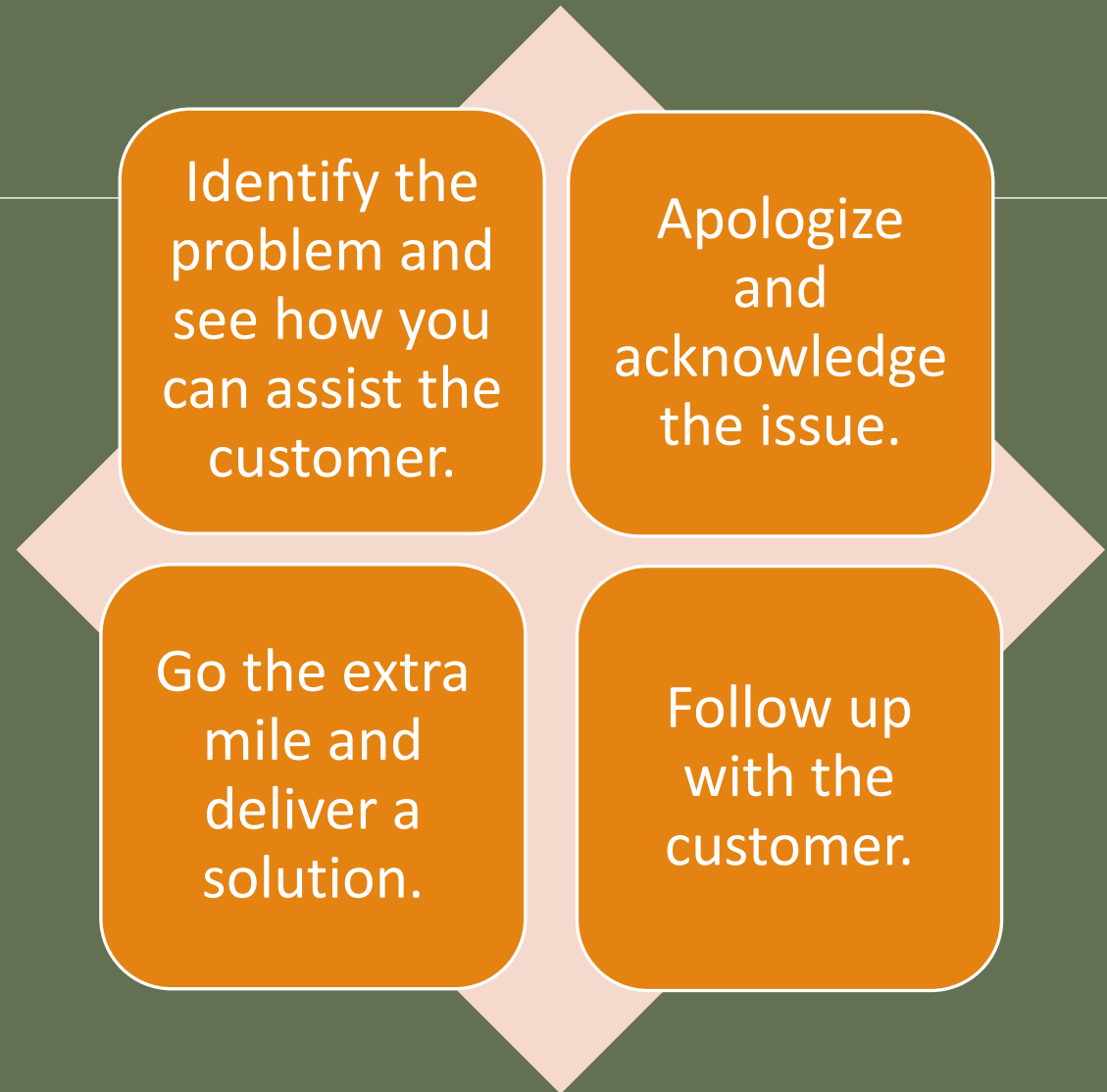
Be confident about your knowledge in any situation.

Never say " I don't know".

Show the customer you care.

You are not required to manage verbal abuse. If you have asked a customer to stop swearing and they continue, let the customer know you are releasing the line.

Remember that all customers are not calling to give you the same treatment. Prepare to handle each customer's concern with the same professional customer service.

Provide a solution

Identify the problem and see how you can assist the customer.

Apologize and acknowledge the issue.

Go the extra mile and deliver a solution.

Follow up with the customer.

ADDITIONAL REMINDERS

1. Make sure you notate the customer's account.

2. Update the account information if needed. (phone number, email address, mailing, etc.)

3. Follow-up if it is needed.

Questions?

Note to committee: Example here of a desk reference for customer service calls

Telephone Etiquette
Cheat Sheet

> ➢ City of Pearland Water Billing, this is Lori. How can I help you? OR
> ➢ Water Billing and Collections, this is Lori. How might I assist you?

Always identify yourself.

> ➢ To better assist you with this, may I have your account number or address?
> ➢ Who do I have the pleasure of speaking to?
> ➢ For verification purposes, can you please tell me the last four of your social?

Always verify who you are speaking to.

Problem Solving:

> ➢ Repeat the question that they had. (Ex. You were inquiring about the most recent bill)
> ➢ Please give me just a moment to review your account and I can help you with this.

Always take a moment to review their account BEFORE you start speaking.

> ➢ Answer the question or issue.

Closing:

> ➢ Now that we have discussed _____, is there anything else that I can assist you with today?

Always repeat the original question asked to ensure that all questions were answered. And ask if there is anything further that you can help them with.

> ➢ Have a great day!
> ➢ Thank you!
> ➢ Bye!

Always be polite and courteous.