| DAS DEPARTMENT OF ADMINISTRATIVE SERVICES<br><br>STATEWIDE POLICY | **NUMBER**<br><br>107-001-040 | **SUPERSEDES**<br><br>New |
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| | **EFFECTIVE DATE**<br><br>November 18, 2024 | **PAGE NUMBER**<br><br>Pages 1 of 3 |
| | **REVIEWED DATE**<br><br>November 18, 2024 | |
| **DIVISION**<br><br>Chief Operating Office | **AUTHORITY**<br><br>ORS 174.112, 182.124, 352.002 | |
| **POLICY OWNER**<br><br>Director | | |
| **SUBJECT**<br><br>Enterprise Customer Service Standards | **APPROVED SIGNATURE**<br><br>Berri Leslie, Director | |

## POLICY STATEMENT

This policy supports agencies in promoting trust in Oregon state government and elevating quality customer service in daily operations by planning for and delivering accessible, timely and responsive customer service.

The purpose of this policy is to:

- Ensure universally accessible and responsive communication with Oregonians and agency business partners
- Reinforce an equitable customer service culture across the enterprise
- Continuously measure customer service feedback
- Continuously improve

## APPLICABILITY

This policy applies to all agencies within the Executive Branch, as defined in ORS 174.112, excluding the following:

- Secretary of State
- State Treasurer
- The Attorney General, but only with respect to its authority, per ORS 182.124, over information systems security in the Department of Justice
- Oregon State Lottery
- State Board of Higher Education or any public university listed in ORS 352.002

## ATTACHMENT

Criteria Checklist

## DEFINITIONS

**Contact Center:** A system that coordinates telephone and electronic contacts between the agency and the public.

**Customer:** Any individual internal or external to state government who interacts with a state agency.

**Customer Facing:** State occupied location open to the public.

**Customer Service:** Timely, accessible, equitable, and responsive support-based interactions between agencies and customers.

**Key Performance Measures (KPM):** Performance measures designed to improve the efficiency and effectiveness of state programs and services.

**Phishing:** A social engineering attack using email or a messaging service to send messages intended to trick individuals into taking an action such as clicking on a link, opening an attachment, or providing information.

**Spam:** The abuse of electronic messaging systems to indiscriminately send unsolicited bulk messages.

## POLICY

Agencies will develop an internal customer service policy which, at a minimum, reflects the elements outlined in this policy. Agency policies must be submitted to the Department of Administrative Services, along with the agency's customer service KPMs, for review prior to implementation.

**Professional Workplace**
Agencies shall ensure all communications are inclusive, respectful and professional and supportive of the mission of the agency and the values of Oregon state government.

**Inclusive Customer Access**
Agencies shall provide inclusive customer access by complying with:

- The Americans with Disabilities Act (ADA)
- Enterprise Information Services (EIS) E-Government Guidance
- Agency policy and practice on use of language interpretation for individual communication

Additionally, agencies shall offer communication choices to customers by making phone, video calls, email and webform submissions available when possible

Agencies with customer-facing offices shall establish minimum operating hours. Factors to consider include:

- Staff and resources available
- Agency Key Performance Measures
- Community needs

Agencies shall post customer service contact information on agency websites. Agency contact information shall include any customer service phone numbers, office locations, walk-in service locations, mailing addresses, hours of operation and instruction on how to schedule an appointment. Agencies shall post any

scheduled closures deviating from an agency's posted hours of operation on all agency communication channels in advance of the closure, examples include voicemail, website, social media accounts, and shared through a media advisory. For unplanned closures, agencies shall follow State HR Policy 60-015-01, Temporary Interruption of Employment.

Agency websites will be as accessible as possible and kept up to date with relevant information. All email addresses listed on a website must be active and responded to as outlined in the Responsiveness section of this policy. Agency service levels must be posted on the agency website.

**Responsiveness**
Agency employees shall, at a minimum, acknowledge receipt of voicemail, text message, and email (including web messages, if applicable) within one business day. Employees unable to reply within this timeframe due to absence shall update their voicemail greeting and email autoreply with details about their return and an alternate contact name, phone and email of who can provide responsive assistance while the employee is not available.

This does not include phishing and spam interactions.

Agencies shall routinely review mail procedures to ensure all paper mail is opened, routed and acted upon timely, as determined by the agency.

In addition to the initial response within one business day, agencies with contact centers shall establish service level goals for response times. Factors to consider include:

- Staff and resources available
- Agency Key Performance Measures
- Complexity of work
- Accessibility and cultural and linguistic responsiveness
- Nature of work (i.e., seasonal)

**Customer Service Strategy**
Agencies shall develop, document and maintain a customer service strategy. The strategy may be incorporated in the agency strategic plan or a standalone document and shall include:

- Service level goals based on customer feedback received through means such as surveys.
- Data analytics and reporting capabilities to support data-driven decisions.
- Identification of self-service and accessible tools so customers can more readily answer their own questions.
- Identification of root causes of calls and emails and the agency's plans to resolve identified issues.
- Communication channels that include self-service options when appropriate, while not eliminating live assistance or equitable access.
- Continuous improvement processes to ensure that service delivery is keeping pace with customer expectations and available technology.
- Continuous identification and measurement of diversity, equity and inclusion strategies within the context of the agency's service delivery goals.
- Agencies with contact centers shall maximize the use of available contact center technology to improve service by using contact handling features, workforce planning, data analytics and reporting.
- Agencies with contact centers shall maintain a plan for responding to unplanned high-volume events.

Agencies will develop an internal customer service policy which, at a minimum, reflects the elements outlined in the Enterprise Customer Service Standards policy. Agency policies must be submitted to the Department of Administrative Services, along with the agency's customer service KPMs, for review prior to implementation.

All agency policies and supporting materials must be submitted to strategic.initiatives@das.oregon.gov by March 31, 2025. The following criteria will be used when reviewing agency policies.

## All agency customer service policies must:

**Define what customer service means at the agency**

- ☐ Identify the agency's core customers
- ☐ Define "professional workplace communication" and agency expectations for it
- ☐ Define "customer service" and what supporting its quality means at the agency
- ☐ Describe where the agency has chosen to outline its customer service strategy
- ☐ State where the public can access the policy (if on the agency website or elsewhere)
- ☐ Provide a single point of contact for matters related to the policy

**Provide information to support customer accessibility**

- ☐ State that agency will ensure accessibility in compliance with ADA and EIS e-Government guidance
- ☐ Describe extent agency will provide alternative languages and universal communication options
- ☐ State that contact information will be updated on websites, including:
    - Phone numbers
    - Walk in service locations (with address(es))
    - Mailing address(es)
    - Operating hours
    - Instructions for scheduling agency services
- ☐ Specify the agency's minimum operating hours for customer-facing services

**Outline customer service performance expectations and improvement processes**

- ☐ Establish agency expectations for customer service performance
- ☐ State that agency will acknowledge customer communications within one business day
- ☐ Outline processes to monitor and improve customer service performance
- ☐ Specify how agency will use service level goals to manage quality of contact center services
- ☐ Describe a process for ensuring contact information on website stays updated