



City of El Paso

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**Measuring Customer Service  
in the Financial Services  
Department**

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# TABLE OF CONTENTS

<b>I. Introduction.....</b>	<b>4</b>
<b>II. Customers.....</b>	<b>4</b>
<b>III. Performance Measures.....</b>	<b>5</b>
<b>IV. Customer Service Survey.....</b>	<b>5</b>
<b>V. Monthly Review.....</b>	<b>5</b>
<b>VI. Annual Review.....</b>	<b>6</b>
<b>VII. Training of Staff.....</b>	<b>6</b>
<b>Appendix I: Sample Customer Service Survey.....</b>	<b>7</b>

# **City of El Paso**

## **Measuring Customer Service in the Financial Services Department**

### **I. Introduction**

One of the strategic goals of the City of El Paso is to become a high performing, customer-focused organization.<sup>1</sup> This goal is to be adopted by all departments and translated into two major objectives:

- Discover the base line public perception of current City services and develop instruments for ongoing public surveys of service.
- Develop and enforce core service and customer service delivery standards throughout the City, establishing performance measures that determine quality and effectiveness.

The Financial Services Department seeks to measure customer service and measure staff performance in responding to its customers on a frequent basis. This is done to ensure that staff is providing good customer service to its customers and meeting the two aforementioned objectives.

### **II. Customers**

Because of its diverse operations, the Financial Services Departments has many customers including but not limited to:

- Current City employees
- Retired City employees
- Vendors
- City residents
- Funding agencies
- Other governmental entities

Functions such as Payroll, Accounts Payable, Treasury Services, and Grant Accounting touch many different types of customers. The action steps adopted by the department to measure customer service must be developed with this broad customer base in mind.

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<sup>1</sup> Customer Service Operations Policy Statement Adopted by El Paso City Council in 2006.

### **III. Performance Measures**

#### Survey cards

Survey cards will be strategically placed within the Financial Services Department at five different locations in order to ensure responses are being received from as diverse a customer population as possible. Survey cards will be placed at the following locations that may change as necessary in order to maximize the number of responses received:

1. Pension Payroll
2. Accounting Receptionist
3. Purchasing Division
4. Treasury Services Division
5. Capital Assets Division

Staff should also encourage customer's participation in the surveys. A lockbox will be made available at these public service counters to maintain confidentiality of the surveys received.

#### Email Survey

The Customer Service Survey will also be placed on the Financial Services website in a prominent location to encourage web visitors to respond and provide feedback. These surveys will be sent to a central location in the Financial Services Department and will be reviewed by the appropriate staff.

### **IV. Customer Service Survey**

This customer survey was developed by Financial Services staff with a focus on determining the satisfaction of customers as well as ensuring that customer service was delivered accurately, courteously, and timely. A "Comments" area is also provided for customers to provide feedback that the questions may not address.

### **V. Monthly Review**

On a monthly basis, assigned staff will compile surveys received both in writing and through the email and prepare an analysis of the responses. This information will be reviewed at Division staff meetings on a monthly basis. Training and other corrective actions will be discussed and implemented as necessary in order to ensure the customer service remains a focus in the Financial Services Department.

## **VI. Annual Review**

On an annual basis, Division supervisors will review the Customer Service Survey to ensure that customer service issues are being addressed. Changes will be made as necessary to the survey. This manual will also be reviewed to ensure any appropriate changes are made to measure customer service in the Financial Services Department.

## **VII. Training of Staff**

In order to ensure that the customer service objectives are being met, staff will be provided customer service training on an annual basis. Assigned staff will maintain rosters of completed training to ensure that all Financial Services Department staff is aware of customer service and its impact on the delivery of services.

# Appendix I: Sample Customer Service Survey



## Financial Services Department Customer Service Survey

What area of Financial Services did you visit today?

- Administration       Accounts Payable       Accounts Receivable  
 Treasury       Pension Payroll       Reporting/Grants  
 Bids       Buyers       Capital Assets       Payroll  
 Contract Administration       Financial System

1. Are you satisfied with the courtesy of the Financial Services staff that assisted you?  
 Very Satisfied  
 Satisfied  
 Somewhat Satisfied  
 Dissatisfied  
 Very Dissatisfied
2. Did you receive accurate and timely information?  
 Very Satisfied  
 Satisfied  
 Somewhat Satisfied  
 Dissatisfied  
 Very Dissatisfied
3. Were you assisted promptly by the first person you spoke with?  
 Yes  
 No
4. If not how many people did you speak with?  
 One  
 Two  
 Three or more

**Comments:**