



## ADMINISTRATIVE POLICY

<b>TITLE:</b> Customer Service		<b>PROCEDURE #:</b> CS-1
<b>DEPT:</b> Department of Assessments and Taxation		<b>DIVISION:</b> All Staff
<b>EFFECTIVE DATE:</b> 3/1/2016	<b>REVIEWED:</b> ALR	<b>REVISED:</b> ALR

**OBJECTIVE:** To establish a procedure to carry out a uniform department-wide customer service program.

**REFERENCE:** Policy #CS-1

**APPLICABILITY:** All Maryland Department of Assessments and Taxation (The Department of Assessments and Taxation) employees.

### DEFINITIONS:

**Customers:** Anyone who requests or receives a product or service from The Department of Assessments and Taxation.

**Customer Service:** Efficient, fair, cost-effective delivery of products and services to meet the customer's reasonable expectations, and needs.

**Complaint:** A complaint is defined as any written or verbal communication from a customer expressing dissatisfaction with a service provided or action taken by The Department of Assessments and Taxation which is beyond the scope of standard department operations or into which further investigation is required. In addition, requests which are out of the ordinary and requests which seek a change in The Department of Assessments and Taxation services or policies should also be logged.

**Resolution:** A complaint is considered resolved when the customer understands what action will or will not be taken. If no action will be taken, the customer will be advised why and what other resources may be available.

**Public Record:** A public record contains information relating to the conduct of

the public's business and prepared, owned, used or retained by a public body, regardless of the physical form or characteristics.

COMPONENTS OF THE The Department of Assessments and Taxation CUSTOMER SERVICE PROGRAM:

1. The Department of Assessments and Taxation Customer Service Program Standards
2. Employee Accountability & Program Manager Performance Appraisal
3. Customer Service Tracking Spreadsheet (CSTS)
4. The Department of Assessments and Taxation Surveys to Measure Customer Satisfaction

1. The Department of Assessments and Taxation Customer Service Program Standards

1.1. All The Department of Assessments and Taxation employees shall comply with the The Department of Assessments and Taxation Customer Service Program Standards (the "Standards"). The Standards consist of the following topics (details included in Attachment A):

- 1.1.1. Guiding Principles of The Department of Assessments and Taxation's Customer Standards
- 1.1.2. Telephone/Voicemail Protocols
- 1.1.3. Written Correspondence
- 1.1.4. E-Mail Protocols
- 1.1.5. Working Directly with Customers

2. Employee Accountability & Department Head Performance Review

To ensure all The Department of Assessments and Taxation employees are complying with the The Department of Assessments and Taxation Customer Service Program Standards, as part of annual and mid-cycle performance evaluations, all The Department of Assessments and Taxation employees, including program managers and supervisors, will be evaluated on their handling on customer service issues.

3. Customer Service Tracking for The Department of Assessments and Taxation.411@Maryland.Gov

3.1. A Customer Service Tracking System ("CSTS") will assist The Department of Assessments and Taxation Headquarters with the development of a central

repository for the logging of customer complaints or inquiries, as well as enable departments to set more customized targets and standards for their customer service.

- 3.2. The CSTS will facilitate message delegation and routing, as well as allow for the tracking of an inquiry or complaint from the point it is entered into the system up to the point where it is resolved. An inquiry or complaint is considered resolved when the customer understands what action will or will not be taken.

The primary reporting tool of CSTS is a “gov apps” web based system, also known as “IQ”.

- 3.3. Program managers shall direct all employees to keep record of their customer service inquiries and complaints in a way in which they deem acceptable. Program managers will be held responsible for ensuring the customer service requests are being followed through with accordance with Department standards.

#### 3.4. Procedures

- 3.4.1. Any employee can receive a customer inquiry or complaint and therefore shall understand this procedure for acting on complaints.
- 3.4.2. Employees shall resolve inquiries or complaints in a timely fashion, within the time constraints created by their other job responsibilities.
- 3.4.3. Inquiries and complaints may be received by telephone, e-mail, written letters, or verbal messages.
- 3.4.4. An employee receiving an inquiry or complaint shall follow through with the request until it is complete, meaning the customer understands what action will or will not be taken. If the request is able to be answered within a normal time frame (varies by request types) then no extra work will need to be done. If the request is outside of the normal realm, the request must be documented and followed up with. This can be done in several different ways, i.e. through the use of a to-do list, designated folders within an email box or another way in which the officer manager deems acceptable.
  - 3.4.4.1. Pertinent call information to be documented includes, but is not limited to: the date, contact information for the customer, what the problem is, when it occurred, and the desired outcome.
  - 3.4.4.2. Notes of the actions taken must contain a chain of steps taken by the employee who opened the case -- i.e. forwarded this concern to (The Department of Assessments and Taxation employee) will follow up with (Customer ) by X date --

- 3.4.4.3. Employees shall respond to the customer with an acknowledgement within two (2) business days, and a formal notification of action or status within five (5) business days. If additional time to respond is needed, the customer shall be contacted with an estimated time frame for final response.
- 3.4.4.4. Complaints from the public regarding The Department of Assessments and Taxation services, programs, policies or employee conduct, shall be documented with and shared with the Department's designated Customer Service Administrator.
- 3.4.4.5. Complaints regarding the conduct of The Department of Assessments and Taxation employees shall be assigned to Human Resources for appropriate action.
- 3.4.4.6. All other inquiries or complaints shall be forwarded to the designated "help" email box for review, prioritization, and assignment for follow-up, if necessary.
- 3.4.4.7. The resolution of the customer inquiry or complaint shall be communicated to the customer indicating what action will or will not be taken and when the action will be implemented, if applicable.
- 3.4.4.8. The records of customer inquiry or complaints shall be retained per any applicable statutory and regulatory guidelines. All records retained in the CSTS system are public records subject to disclosure unless expressly exempted from disclosure by state or federal law.
- 3.4.4.9. The status of customer complaints shall be reviewed by program managers, supervisors and directors as part of the customer service review process.

#### 4. Department Surveys to Measure Customer Satisfaction

- 4.1. Feedback from customers on their perception of The Department of Assessments and Taxation's quality of service is crucial in the development of excellent customer service. Therefore, the Director's Office may commission periodic statewide surveys to obtain an overall sense of how The Department of

Assessments and Taxation operations and services are meeting the needs of external customers.

4.2. When the survey is complete, program managers shall conduct an analysis of the survey data, create an action plan, and present this information to the Director's' Office within a time period specified by the Director, Deputy Director or Associate Director.

4.3. The survey reports will be used to measure changes in customer satisfaction levels.

## 5. Designation of an Awards Committee

5.1. A successful customer service program motivates and recognizes employees who meet and exceed customer standards. An Awards Committee Coordinator will be designated for the Department.

5.2. The Department Awards Committee shall meet quarterly to review nominations, select recipients, and arrange presentations of awards. Other monthly awards may be given at the discretion of the Awards Committee and Coordinator or the Director.

5.3. The Department of Assessments and Taxation has four employee award categories:

### 5.1.1. Innovation Award:

This award is given to a staff member who has generated novel and valuable ideas and used these ideas to develop new or improved processes, methods, systems, programs or services.

The award recognizes creative ideas that have improved the Department and have made The Department of Assessments and Taxation a better place to work.

Nominees for this award should have demonstrated a combination of the following:

- a) Worked to improve any area of the Department's operations.
- b) Identified creative solutions, large or small in scope, that have made a significant and positive difference.
- c) Suggested new ways to improve the quality of services or programming.
- d) Identified novel approaches for completing work more effectively or efficiently.
- e) Identified new ideas, solutions, or directions.
- f) Worked to develop new approaches when problem

solving; sought ideas or suggestions from others as appropriate.

- g) Planned effectively for the successful implementation and long-term success of new services, systems or programming.

#### 5.1.2. People's Choice Award

This award is given to a staff member and an office who has exhibited commitment, sustained a high-level of productivity and consistent quality of work; demonstrated a high degree of initiative in the performance of functions; displayed exceptional dependability; maintained effective relationships with others; displayed and commended on excellent customer service, and demonstrated leadership qualities. This award will be measured through feedback from the Customer Service "Serving You Well" comment cards.

#### 5.1.3. "Pat on the Back" Award

This award is to recognize a staff member for good deeds, outstanding customer service, assistance with challenging situations in the office, department, community etc.

Nominees for this award should have demonstrated a combination of the following:

- a) Unique acts of courage and caring.
- b) Accomplishing extraordinary feats or significantly exceeding expectations.

#### 5.1.4. "STAR" Award (Service, Teamwork, Attitude, Reliability)

This award is given to the staff member who has consistently excelled in his or her position; has made outstanding contributions in the area of service and dedication to the Department; has promoted teamwork and collaboration across departments; has worked quietly behind the scenes to improve his or her division or department; and who has consistently done so with a positive attitude.

Nominees for this award should have demonstrated exceptional performance in all four of the following categories:

- a) Service: The nominee provides outstanding customer service, whether to customers, co-workers, community members
- b) Teamwork: The nominee develops and encourages cooperation and collaboration, while displaying outstanding

group effort. The nominee also consistently offers support, assistance and encouragement to co-workers, often without being asked to do so.

- c) Attitude: The nominee consistently demonstrates patience, good humor and enthusiasm while on the job. The nominee also demonstrates excellence in resolving conflicts and/or facing challenges.
- d) Reliability: The nominee provides prompt, efficient and reliable service. The nominee is both dependable and trustworthy, and instills in his or her co-workers a sense of responsibility and dedication to the Department.

- 6. Ongoing training in customer service is necessary to establish awareness of the program expectations, as well as update The Department of Assessments and Taxation employees on any changes. At a minimum, training and education of The Department of Assessments and Taxation's customer service standards shall be provided by:

- 6.1. Initial department-wide overview.

- 6.2. New Employee Orientation overview and direction to be provided by program managers.

- 6.3. Ongoing customer service training will be provided annually by program managers, consistent with instructions provided by the Public Information Officer.

## **ATTACHMENT A**

# **The Department of Assessments and Taxation Customer Service Standards**





## **CUSTOMER SERVICE STANDARDS**

The following apply to interactions with both internal and external customers:

- All customers shall be treated professionally and with respect.
- The Department of Assessments and Taxation services, whether presented in person, in written correspondence, or on the telephone, should be timely, accurate, and understandable to our customers.
- Always convey a favorable image of the The Department of Assessments and Taxation, and the program in which you are working.
- We are here to serve the public. The taxpayers of Maryland, our customers, are our employers.
- We will be empathetic, helpful, and attempt to bring about resolutions which are satisfactory to both our customers, and The Department of Assessments and Taxation.
- Take responsibility if things go wrong; the customer is entitled to an explanation, and an apology.

### **Telephone/Voicemail**

#### **Telephone**

- The main telephone number shall be answered during business hours 8:30 AM to 4:30 PM for all departments except the local assessment offices which are operating from 8:00 AM to 4:30 PM.
- Telephones shall be answered promptly, within 3 rings.
- Telephone calls shall be answered courteously and professionally.
- All calls, from both internal, and external sources, shall be answered with a consistent greeting such as “Maryland Department of Assessments and Taxation, this is (insert name), how may I

help you?”

- Telephone calls shall be answered in the order received. Callers may be given the option to be put on hold or called back. A customer will never be asked to call The Department of Assessments and Taxation back - protocol is to take the customer's contact information, and to call them back once their inquiry or complaint is resolved.
- If a caller wishes to stay on the line, and is holding for an extended period of time, regular updates will be provided.
- After the caller has finished speaking, staff will paraphrase what was said to ensure the request is understood (e.g., “Let me make sure I understand your question/concern” (and then restate what they've said).
- If the employee the customer is trying to contact is not available, staff will provide caller the option to be transferred to that employee's voicemail. If it is an emergency, the caller will be directed to an employee who can provide immediate assistance.
- If the information being provided to the customer can also be found on our website, after you have given them the correct information, let them know for future reference this can also be found online and provide the exact webpage where the information may be located.
  - Before Transferring Calls:
    - The nature of the call shall be understood.
    - Callers will be informed to whom they are being transferred.
    - Callers will be provided the name, phone number, and division/program to which they are being transferred.
    - The person transferring the call will, whenever practical, wait for the call to be answered, announce who is being transferred and provide a brief description of the caller's request.
    - If a call is received during interdepartmental coverage and the employee answering the call cannot answer the question, the employee shall explain they are covering for a different department/program and offer to take a message, or transfer the call to voicemail.

### Voicemail

- The greeting of an outgoing voicemail message shall include the full name of the staff person, the program name, frequency with which messages will be checked, and a provision for contacting another employee in person.

- If there is not a provision for contacting another employee in person, such as during non-work hours, communicate this information in the outgoing voicemail message.
- Voicemails received from callers shall be acknowledged within a 24-hour period or within the next business day.
- Outgoing messages shall be kept current.
- Update the outgoing message as circumstances change. Consider special messages or attendant options when you are out of the office for several days.
- Carefully evaluate the content of all pre-recorded messages. Be sensitive to the order in which information is given and the time it takes to give the message.
- Establish a backup system for checking your messages if you are away from the office for an extended period of time. If necessary, forward your calls to another employee.
- Forward your phone to a voice mailbox when you leave your office in order to eliminate the 4-ring waiting period. Deactivate the forward feature when you return.
- Voicemail messages/ greetings for general (non-personal) voicemail boxes, and splits may only be changed with supervisory approval.

#### Business Cell Phone

- The greeting of an outgoing voicemail message shall include the full name of the staff person, the program name, frequency with which messages will be checked, and a provision for contacting another employee in person.
- If there is not a provision for contacting another employee in person, such as during non- work hours, communicate this information in the outgoing voicemail message.
- Voicemails received from callers shall be acknowledged within a 24-hour period or within the next business day.
- Outgoing messages will be kept current.
- Update outgoing messages as circumstances change. Consider special messages or attendant options when you are out of the office for several days.

### Written Correspondence

This section pertains to letters, memorandums, and faxes. This list is not exhaustive.

- The Department of Assessments and Taxation shall develop letter, memorandum, and fax templates for external communications with the public.
- The Department of Assessments and Taxation shall also develop templates for written correspondence.
- Written correspondence should be complete, accurate, and precise. Use spell check, and proofread final documents. When possible, have a second person proofread for you.
- Written correspondence shall be drafted within three (3) business days of the receipt of the customer inquiry or complaint. The final correspondence shall be mailed within 5 business days of the receipt of the customer inquiry or complaint.
- The tone of all correspondence shall be respectful and plain language should be used.
- If responding to a question, include the questions in the response.
- Always provide contact name, number and department to customers.

### E-mails

- Respond to e-mail queries within one business day of receipt of the email query.
- Put the appropriate subject issue in the SUBJECT line. Do not leave the subject line blank.
- Introduce yourself, i.e. "My name is (insert name) and I am the (insert title) for the Maryland Department of Assessments and Taxation."
- Thank the customer for contacting your office.
- Restate all or part of the question or inquiry in your response.
- Close the email with a follow-up date (if applicable) or refer the customer to our website if the information they are requesting can be found on the website. Reference to the website is in addition to, not in place of, information you have provided in your response. Do not solely refer people to our website, you must type the information in

your response and then share the link/webpage.

- Use professional, non-jargon language.
- Always use spell check.
- Always use a signature block with:
  - Your name and title,
  - Your program title
  - Maryland Department of Assessments and Taxation
  - Mailing Address,
  - Phone, fax and e-mail address.
    - For example  
John Doe  
Public Information Officer  
Maryland Department of Assessments and Taxation  
300 W. Preston Street, Suite 600  
Baltimore, MD 21201  
410-767-1111 (office) 410-767-2222 (facsimile)
- Use discretion when responding to group emails. Some individuals who are copied along with original e-mail recipient may not want to be involved in an ongoing e-mail dialogue.
- If you will be away from the office, set your “Rules” in G-mail to respond to incoming emails with information of your absence, return date, and alternate contact person.

#### When Working Directly With Customers

- Make eye contact.
- Listen.
- Take responsibility.
- Be positive.
- Be courteous - excuse yourself if you are interrupted.