

COUNCIL POLICY

Council Policy Title:	Customer Service Policy/Guidelines
Council Policy ref. no:	2.6
Responsible Department:	Corporate and Community Services
Date of adoption/review:	24 July 2013

1. PURPOSE

The purpose of this policy is to outline Council's approach to Customer Service.

Colac Otway Shire is committed to ensuring customers using Council facilities or services receive quality, efficient and responsive service through our Performance Standards.

2. INTRODUCTION

Colac Otway Shire aims to work in a courteous, consistent, timely and fair manner and satisfy all reasonable requests from customers.

The Customer Service Policy aims to provide a document for staff, councillors and customers alike regarding enquiries or complaints received by the Colac Otway Shire, and how they should be resolved.

All areas of the organisation are committed to being customer focussed and our working environment is based on respect for the individual and the community.

Councillors and staff are required to maintain the highest standards of conduct and abide by the Shire's vision, mission and values:

Our Vision

A sustainable community with a vibrant future.

Our Mission

Council will work with our community and partners to provide:

- Innovative leadership, good governance and financial accountability
- Value for money, accessible and appropriately targeted services
- A strong advocacy and engagement approach to achieve a truly liveable community.

Our Values

Council will achieve its Vision and Mission by acting with:

- **Respect** Be open and consistent in our dealings with people and respect their views. Continually work on developing relationships built on trust. Treat others as we would like others to treat us. Acknowledge the opinions of others and their right to be different.
- **Integrity** We will work in an open and transparent way, ensuring our processes, decisions and actions are ethical, responsible and honest.
- **Goodwill** We will have an attitude of kindness or friendliness and build a good relationship with our customers and community.
- **Honesty** We will be consistent, keep our promises, admit our mistakes and clearly communicate our decisions.
- **Trust** We will act honestly, openly and fairly to build levels of trust

Council's dual role as a service provider and a regulatory body can create situations where not all customer requests can be met. However, Council has an obligation to provide customers with an accessible, fair and equitable mechanism to access services, make service requests and obtain assistance. The establishment of a standardised, courteous and professional approach to the management of customer contact, in conjunction with clear policies and procedures, will facilitate the achievement of Council's obligation to its customers. This will enhance Council's image and provide customers with a positive experience of Council.

2.1 Definition of Customers

For the purpose of this policy, customers include individuals and organisations to whom Council provides service. Customers include ratepayers, residents, asset users, daily visitors as well as people passing through the Colac Otway local government area en route to another destination. Internal customers include other Council Departments and members of staff.

3. SCOPE OF THE POLICY

This policy applies to all Council staff and Councillors, contractors, consultants, work placement students and volunteers who deal with customers of Colac Otway Shire.

All Council staff and Councillors provide service to Council's customers either directly or indirectly.

All Council staff and Councillors must strive to meet the needs of our customers in a professional and ethical manner with courteous and efficient service.

Staff and Councillors will:

- Act impartially and actively listen to other people's views, seek advice from a range of sources before forming opinions, making decisions or taking actions
- Treat all people with courtesy and respect even when disagreeing with their views and recognise there are legitimate differences in opinions, race, culture, religion, language, sexuality, gender and abilities and act to prevent offence or embarrassment being caused
- Act in the interest of the Colac Otway Shire community as a whole
- Take personal responsibility for decisions, actions and behaviours
- Exercise all reasonable care and diligence in performing the responsibilities and functions of a Colac Otway Shire employee/councillor.

Further, in conducting our business we will:

- act with integrity and honesty
- be customer-focused
- deliver 'value for money' services in a professional manner
- be innovative, with a focus on performance, outcomes and excellence
- be environmentally responsible
- be effective and open in our communication.
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4. WHAT IS CUSTOMER SERVICE?

Customer service refers to the interaction between internal staff, councillors, interaction between agencies and those in the community who want or need a product or service from the Colac Otway Shire. Such contact can take a variety of forms including personal or telephone communication, media messages, forms and publications.

Quality customer services is defined as the provision of service which meets customer needs and expectations on the aspects of service which matter most to the customers, within the framework of legislation, policy and budget.

5. PERFORMANCE STANDARDS

To achieve Council's Service value, Performance Standards have been developed to ensure consistency and quality in presentation and responsiveness to meet our customer's expectations, and accessibility to information:

1. Customer Interaction
2. Request Handling
3. Corporate Image
4. Information Management

These Performance Standards will guide our overall organisational customer focus however, Business Units may adopt site-specific standards to assist them to meet their particular customer expectations within their resources. These must be in line with the standards and the Shire's values.

Copies of the standards are attached at Appendix 1 of this document. They contain an explanation of the Performance Standards, how they are going to be measured and what actions can be taken to improve the overall organisational targets.

The Performance Standards are monitored and measured through the following mechanisms:

- Annual Customer Satisfaction Survey
- Performance Management process (PES).
- Colac Otway Requests System (MERIT).
- Regular reviews by individual Business Unit Team Leaders and Managers.
- Feedback Sheets for Customer Interaction.
- Customer Service Benchmarking Australia Report.

6. GUIDING PRINCIPLES OF SERVICE PROVISION

The standards our customers have a right to expect at all times by Council are:

- to listen to what you say
- be approachable and professional at all times
- treat customers courteously and with respect
- address you by your name when we know it
- give officer identification when talking to customers
- follow up on service commitments that we make to you
- respond as quickly and efficiently as possible to service requests and service complaints
- be punctual for meetings and appointments
- treat customer's personal information with confidentiality
- be factual and accurate in the information provided.

7. TYPES OF CUSTOMER SERVICES

Customers contact Council for a wide variety of issues ranging from enquiries and requests for information or advice, to the provision of direct services, i.e., Development Applications, Dog Registrations, etc.

(1) Telephone Calls

Council recognises the importance of telephone calls and will answer all calls promptly and efficiently, referring calls to the appropriate officer quickly and providing clear and concise information in response to caller enquiries. Council will endeavour at all times to :

- Greet the customer with an appropriate welcome, stating Colac Otway Shire and the name of the officer eg. "Welcome to Colac Otway Shire this is Raelene".
- Outgoing calls: officers need to announce they are calling from Colac Otway Shire and state their name.
- If an incoming call is answered at Customer Assist the officer will establish and clarify the nature of the call and if possible resolve at that point.

- If an incoming call is answered at Customer Assist and the enquiry cannot be resolved by the officer, the customer will be transferred through to the appropriate officer – customer's name and all information relevant to the enquiry will be announced at this point.
- If the appropriate officer is not available the customer can leave all details on the officer's voicemail or with the Customer Assist office. It is the responsibility of the Customer Assist officer to create a MERIT for this request stating contact numbers and all relevant information.
- When calls cannot be fully responded to immediately, give clear advice to the caller about when they can expect a response.
- Put calls onhold for the minimum amount of time possible.
- Convey a manner of interest, be warm and helpful at all times.
- Answer unattended telephones in the absence of staff in the particular section/department whenever practicable.

Telephone protocols have been developed to provide basic guidelines for staff in terms of managing telephone calls and establishes standards and practices with the use of technical features of telephone services. It aims to ensure that telephones are answered in a welcoming, consistent and informative manner that gives a positive and professional impression of the Shire.

A copy of the Telephone Protocols is attached at Appendix 2 of this policy.

(2) Written

Council recognises the importance of correspondence (letters, facsimiles and email messages) and will provide clear and concise responses promptly. Council endeavours to:

- provide a response to all matters in line with the Request Handling Performance Standard
- ensure that all outward correspondence includes the name and contact details of the officer dealing with the matter and Council's file reference
- use language that is clear and concise
- provide documentation in a larger font on request.

Colac Otway Shire style guidelines provide further information on communications on behalf of the organisation.

(3) Face to Face

Council recognises the need to promptly serve members of the public who come to Council to seek information or transact business. Council will endeavour to have officers available to the public during office hours and at designated times. Council endeavours to:

- ensure officers are available for interviews by prior arrangement
- attend to members of the public at the reception areas in a professional and helpful manner

- promptly advise staff if there is a member of the public in the reception area for an appointment
- provide a full range of information for public inspection in all Colac Otway Shire reception areas
- speak clearly and welcome visitors in a professional, warm and helpful manner
- make appointments to visit a customer external to Council's facilities. At the beginning of any Council visit, staff or Councillors must clearly identify themselves and the purpose of the visit
- ensure that all relevant staff are present to address each matter appropriately.

8. RECORDING AND FOLLOWING THROUGH ON REQUESTS

Colac Otway Shire has a Customer Request Management System which is used to record internal and external customer requests and complaints.

All requests are directed to the relevant department for a response and actions taken are recorded. Timelines for resolving responses are set and adherence to the timelines are monitored.

The system has many benefits including:

- a record of all customer requests
- enables the quality of the response to be monitored through reporting and escalation processes
- produces quality reports for senior management
- facilitates the identification of patterns and trends for the purposes of service improvement and planning.

9. HOW STAFF ARE SUPPORTED TO PROVIDE CUSTOMER SERVICES

In order to meet the objectives of the Customer Service Policy, organisational resources have been provided in the areas of training and induction programs, telephone facilities, monitoring systems, accessibility and maintenance of Council information, survey and feedback mechanisms.

10. DEALING WITH DIFFICULT CUSTOMER BEHAVIOUR

Council staff and Councillors aim to treat customers with courtesy and respect at all times and to make every reasonable effort to address the customer's needs even when s/he is rude or difficult. Customers are also expected to treat Council staff and Councillors with respect and courtesy. It is certain however, that whatever standard of professional and positive customer service Council achieves, there will always be a small percentage of customers whose issues cannot be dealt with to their satisfaction.

This may be due to refusal by the customer to accept a Council decision, demands placed on Council which are not within our scope or resources to meet, or a level of rudeness or aggression shown to staff or a councillor by the customer that makes it unsafe or unreasonable to proceed.

In these situations Colac Otway Shire will take steps to ensure our staff's health, safety and wellbeing is protected.

10.1 Definitions

Difficult customer behaviours: Rude, abusive or aggressive behaviour may include rude or otherwise vulgar noises, expressions or gestures, verbal abuse either of a personal or general nature, intimidating, threatening or offensive behaviour, physical violence against property or physical violence against a person.

Customers who cannot be satisfied and/or who constantly raise the same issue with different staff: may include any person or groups who do not accept that Council is unable to assist them, provide any further assistance or level of service than has been provided already and/or disagree with the action Council has taken in relation to their complaint or concern and who continue to make representations to staff insisting, demanding action/attention/resolution to their matter.

Customers who make unreasonable demands: Customers who make unreasonable demands include any person whose demands on Council start to significantly and unreasonably divert Council's resources away from core functions or create an inequitable allocation of resources to other customers. Such demands may result from the amount of information requested, the nature or scale of services sought or the number of approaches seeking information, assistance or service.

10.2 Procedure for Dealing with Difficult Customer Behaviours

Rights and responsibilities

If, in any interaction with a customer over the phone or in person a staff member or a councillor feels uncomfortable due to the hostile or volatile nature of the customer, it is appropriate that the call/interaction is terminated by doing one of the following:

- advise the person that *"I can not help you and will get someone else to ..."*
- if they are swearing, abusive or threatening advise the person that *"I would like to assist you and will do so if you refrain from using inappropriate language, but I am unable to assist you if you continue to behave in this manner. I will ask my Manager/Coordinator to come and assist you"* and if appropriate introduce a third person into the interaction.
- advise the person that if they do not cease the abuse the phone call will be recorded.

If the behaviour continues advise the customer *"I am unable to help you and I am terminating the call/meeting"*. If necessary the staff member should either hang up or leave the room and move to another safe area to ensure personal safety.

Where a conversation or interview is terminated or if a staff member or councillor is verbally or physically abused, the staff member must then immediately inform his/her Manager or the CEO of the incident and complete an incident report. The matter will then be discussed to determine what action, if any should be taken with respect to the customer's behaviour. If necessary a meeting should be arranged with the Councillor, relevant staff, their Manager and General Manager to discuss the details of the situation.

If a staff member is observed or heard to be involved in a difficult interaction with a customer, other staff are expected to provide assistance or immediately seek assistance from another staff member. Assistance may be provided simply by being present during the interaction.

Staff are encouraged to talk to and seek advice from their Manager regarding dealing with difficult customers.

Council will provide training on dealing with difficult people following an assessment of Organisation Development requirements/needs.

10.3 Management responsibilities

Where the General Manager/Manager is satisfied that every effort has been made by staff to address a customer's needs, he/she may make a decision that there is no reasonable prospect of reaching a position where a particular customer is satisfied with Council's actions and service. In such a case the General Manager may make a decision to stop or limit responses to the customer in relation to the issue in question and/or further interactions with the customer.

This may include:

- refusal to accept telephone calls or make appointments with the customer
- a request that all future communication be in writing
- provision of responses to queries
- information requests only where a new issue has been presented
- identification of a single staff member as contact person through whom all communication must occur.

Where such a decision has been made the General Manager will communicate the decision in writing to the customer and ensure the customer is given the opportunity to make representation or appeal to the Chief Executive Officer about the proposed course of action.

The Chief Executive Officer will advise the Mayor/Councillors of any correspondence issued in relation to such a decision.

The General Manager/Manager will ensure that relevant staff including the Customer Services Unit are advised of any decisions/actions

Customer Assist officers are to be provided with a standard response: *"Thank you for calling, however as you have been previously advised, you are required to put all your requests in writing addressed to the Chief Executive Officer Colac Otway Shire."*

The General Manager/Manager in consultation with relevant staff will continue to monitor any further contact with the customer over the issue and the above directions be amended as appropriate.

The General Manager/Manager shall advise the Organisational Support & Development Unit of situations referred to in this policy. As appropriate the Organisational Support & Development Unit shall arrange appropriate support services for staff.

10.4 General responsibilities

In all of the situations referred to, adequate documentary records, incident reports etc must be made and maintained on the appropriate Council file.

11. RESPONSIBILITY/ACCOUNTABILITY

11.1 One of the key functions for the organisation is to create a customer-focused environment.

Creating a customer service environment is integral to the business of the Colac Otway Shire.

In a customer service organisation everyone, not just frontline staff need to be focused on the customer as everyone is part of the customer service chain.

11.2 Everyone who acts on behalf of the Colac Otway Shire is:

- *accountable for the quality of the service they deliver*
- *responsible for identifying and reporting any impediments to delivery of good customer service.*

11.3 **General Managers** are accountable for ensuring consistently high levels of customer service in their Departments.

Management is responsible for acting upon any identified impediments to the delivery of good customer service.

11.4 The **Organisational, Support and Development Unit** is responsible for arranging any training and/or coaching on customer service and communication skills.

12. REPORTING AND COMMUNICATION

Council will communicate outcomes of our performance to Staff, Councillors and the Community through the Annual Report.

13. BREACH OF POLICY

Non-compliance with this policy will be determined through individual staff performance management.

Opportunity for re-training made available if required.

14. RELATED POLICIES/PROCEDURES/GUIDELINES

- Performance Management System
- Colac Otway Shire Style Guidelines
- Council Code of Conduct
- Staff Code of Conduct

15. POLICY IMPLEMENTATION

All staff will be responsible for implementing this policy. Managers and Supervisors will be responsible for monitoring their staff through the Performance Management System and contractors through contract monitoring processes.

16. ATTACHMENTS/APPENDIX

APPENDIX 1 – Performance Standards

APPENDIX 2 - Telephone Protocols

ADOPTED/AMENDMENT OF POLICY

Policy Review Date	Reason for Amendment
25 November 2008	Adopted by Council
28 April 2010	Review
24 July 2013	Review

APPENDIX 1 – CUSTOMER SERVICE PERFORMANCE STANDARDS

Introduction

One of Colac Otway Shire's organisational values is Service and a key objective is to ensure all staff are committed to being customer focused and embrace the Customer Service Performance Standards. These Performance Standards will ensure consistency and quality in our presentation, responsiveness to meet our customer's expectations, and accessibility to information.

In June 2004, a staff committee reviewed the current performance standards and integrated them into four organisational customer service responsibilities:-

1. Customer Interaction
2. Request Handling
3. Corporate Image
4. Information Management

These Performance Standards will guide our overall organisational customer service focus. Business Units may adopt site-specific standards to assist them to meet their particular customer expectations within their resources. These must be in line with the standards and the Council's values.

Customer Service training and refresher courses will be made available to all staff annually or as required to ensure consistent standard of service delivery.

Customer Satisfaction is independently measured on an annual basis on all Councils throughout Victoria.

MERIT includes ongoing and agreed time lines for responses against each category and outstanding requests are monitored on a regular basis.

The Organisation recognises staff who comply with criteria set out in the Performance Standards through the Performance Management process. Council further recognises excellence in Customer Service through Reward & Recognition programs.

This document contains an explanation of the Performance Standards, how they are going to be measured and what actions staff can take to improve the overall organisational targets.

1. Customer Interaction

Performance Standard Objective

To guide the way we interact with internal and external customers directly by telephone or personal contact.

Criteria

Telephone Interaction

- All telephone calls will be answered within 3 rings where possible.
- Council staff will identify themselves to callers, being courteous and professional at all times (*Refer to Appendix 2 – Telephone Protocols*).
- Telephone messages will be returned within 24 hours, wherever possible.
- Staff should answer other staff members phones in their common group in their absence and assist the caller by taking a message or offering to leave a message on voicemail where appropriate.
- Where staff have use of a dedicated mobile phone, their office phone should be diverted to their mobile phone when practicable.

Customer Contact

- When visiting Council premises, customers will be attended to without delay in a friendly, courteous, helpful and professional manner.
- Use the customer's name to help build rapport and diffuse tense situations.
- Show empathy and acknowledge the customer's concerns.
- Actively listen, take notes and tell the customer what you are going to do, and when they can expect a response. Be realistic, "only promise what you can deliver".
- Do not take comments personally – sometimes people may be angry at the system – not you personally.
- Do not argue or enter into dispute – remain calm, objective and professional.
- Do not blame other people, units or the customer.
- Staff will take responsibility for finding a resolution to the customers' enquiry and ensure the customer has a contact name for follow up.
- Staff will be responsive to requests for information.
- Staff will arrive on time for meetings and appointments.
- When absent, staff will use appropriate mechanisms to advise other staff when they will be available.
- Where a record of conversation form is used or a telephone conversation is recording staff are to ensure that it is filed electronically in TRIM

How Performance Standards will be Measured

The Council participates in the Annual Customer Satisfaction survey which rates Council's interaction and responsiveness in dealing with the public. Customers are asked to rank Council's performance in the way they were treated with things like ease of contact, helpfulness and ability of staff, speed of response, and attitude (survey co-ordinated by the Office of Local Government).

The Council also participates in benchmarking with other Councils through Customer Service Benchmarking Australia.

Performance will also be measured through the organisation's Performance Management process.

How Staff can improve their Performance

- Answer and return telephone calls promptly and identify yourself and the organisation.
- Treat all customers consistently and use a professional and friendly manner.
- Use the Outlook Calendar/Phone System to ensure staff are aware of your movements to assist you with your customer service.
- If you are going to be absent, let your Manager know asap.
- If you are taking leave organise with the MERIT administrator to ensure your MERITS are actioned within the designated timeframe.
- Take messages for other staff in your group and record on MERIT if practicable.
- Attend to all customers promptly.
- Provide timely, useful and accurate information.
- Actively listen to the customer's concerns.
- Be aware of the Dealing with Difficult Customer Behaviour clause in the Customer Services Policy.

2. Request Handling

Performance Standard Objective

To guide the way we deal with and respond to internal and external requests, and action items arising from meetings.

Our aims are to:

- Provide an easy mechanism through which a customer or staff member can make a request.
- Recognise the community and staff have a right to make a request and that this should be seen as a positive and constructive process.
- Ensure that staff are committed to responding to the requests of other staff members, our customers, the Council and the wider community.
- Ensure all internal and external requests, including action items from minutes are entered in MERIT and are acted upon within designated timeframes.

Criteria

- Staff who handle requests, either in writing, over the telephone, or face-to-face, which require any further action should enter the request into the MERIT System so that the requests can be recorded and tracked.
- When you are absent for extended periods, ensure your MERIT requests are actioned by another officer. This can be done by using the system to allocate an alternate officer and making yourself unavailable.
- Discretion is to be used as to whether the customer is asked to put a request in writing.
- Take personal responsibility for the request and provide a contact name for follow up.
- Requests for information should be distributed within 1 working day of the request.
- Attempt to resolve the request at the time. It is acknowledged that many requests take time to resolve. If it is not possible to deal with the request immediately, make a commitment to resolve the matter within a timeframe that is realistic and agreed with the customer. (Note the expected completion times are programmed into the MERIT system; these times can be modified when necessary).
- Give the customer options to consider when negotiating a resolution to a request.
- Once resolved, and if appropriate, confirm in writing what the resolution is. If any actions are required, make sure you complete them.
- Conclude or complete a verbal or written enquiry or request by thanking the customer.
- Regularly inform the customer on the progress of matters that cannot be resolved in a given short time frame.
- If a request is received by letter, it may be appropriate to call the person involved to find out more information or to advise that the matter is being investigated.
- If the customer is still not happy at the end of the process, explain that you will refer it to your Team Leader/Manager/ General Manager. Prior to briefing your Manager ensure that MERIT is updated with the latest information.

How Performance Standards will be measured

- Executive and Managers will regularly monitor outstanding requests through reports generated from MERIT.
- By the Annual Customer Satisfaction rating for Council's interaction and responsiveness in dealing with the public. Customers are asked to rank Council's performance in the way they were treated with things like ease of contact, helpfulness and ability of staff, speed of response, and attitude. (Survey co-ordinated by the Office of Local Government).
- Performance will also be measured through the organisation's Performance Management process.

How Staff can Improve their Performance

- Recognise that requests can provide constructive information through which we can improve our service and performance.
- Listen, remain calm and professional and always treat the customer with respect.
- Take responsibility for resolving the request, including finding information from other work areas.
- Negotiate with the customer to provide a response within an agreed timeframe.
- Keep the customer informed of progress if a matter takes some time to resolve.
- Log all customer requests which require any further action on MERIT.
- Log all actions from minutes on MERIT.
- Ensure you check your MERIT requests regularly and respond to requests within the agreed timeframes as stated in the MERIT system.

3. Corporate Image

Performance Standard Objective

To present a professional approach when interacting with our customers both in person, over the telephone and through written correspondence; and to ensure the clean, tidy and neat image of our Customer Service areas.

Criteria

Presentation

- Ensure all areas especially areas in public view are clean, tidy and professionally presented.
- Staff will present a professional image in appearance (full uniform where required) and have a high standard of personal presentation (well groomed).
- Staff will wear Council name badges or identification when dealing with external customers or when representing Council.
- No food, drink (other than water) or chewing gum will be consumed by staff in Customer Service or areas in public view.
- All signage on walls to be professionally presented.
- Conference/meeting rooms and Staff rooms are to be left in a neat and tidy manner by users, including ensuring all food and drink is removed.

Written Correspondence, Agendas & Minutes

- Standard templates and Corporate Style Guidelines will be used for all correspondence, agendas and minutes.
- When preparing correspondence, all staff will ensure:
- layout complies with Corporate Style Guidelines
 - contact name and phone number is provided
 - a professional and personal tone is used
 - the correct greeting is used
 - letters are signed
 - correspondence is free of spelling, grammatical and typing errors
 - all attachments are enclosed
 - "With Compliments" slips are attached when appropriate
 - envelopes are addressed correctly and typed
 - Corporate forms should be printed on Corporate Form paper (available from IMS).

How Performance Standards will be Measured

Customer Assist officers will regularly ensure that public areas are clean, tidy and neat and information brochures and documents are up to date. Team Leaders and Managers will also monitor staff presentation to ensure a professional image is conveyed to our customers.

It is essential that correspondence is written in a professional and accurate manner following the criteria set out above. Executive and Managers will monitor response times to written requests using reports generated through the MERIT system.

Every quarter, Information Management Services Business Unit will review random items of outgoing correspondence for compliance with the Corporate Style Guidelines, template used, spelling/grammar checked, envelopes typed, letters signed and copy filed in TRIM.

Performance will also be measured through the organisation's Performance Management process.

How Staff can Improve their Performance

- Ensure all areas have a clean, tidy and professional appearance.
- Ensure work areas and meeting rooms are kept tidy and clear of clutter.
- Attend to all customers promptly and present a friendly and professional approach when dealing with customers.
- Staff members are appropriately presented with name badge or identification.
- Provide timely useful information.
- Use Microsoft Word templates and Corporate Style Guidelines to guide layout, font size, text, addressing etc.
- Use a professional and personal tone of writing.
- Use spell check and proof read all outgoing correspondence.
- Ensure attachments are enclosed with correspondence.
- Make sure all envelopes are correctly addressed and typed (either directly or using labels).
- Make sure all written requests are responded to within specified timeframe.
- When you are away for extended periods ensure your MERIT requests are actioned by another officer.

4. Information Management

Performance Standard Objective

To ensure our customers have access to relevant and accurate Council information and services.

Criteria

- Ensure the most relevant media is used to inform our customers through advertising, media releases and news columns.
- Ensure that web site and intranet information is up to date, relevant and accurate.
- Ensure brochures, directories, public documents and other publications are available from our Customer Service Centres in Colac and Apollo Bay and available via the Internet.
- Inform our customers of Council's performance through our Annual Report.
- Circulate information to new residents through our New Residents Kit.
- Incoming information will be managed and distributed daily.
- Ensure accurate and complete information is maintained in TRIM.
- Corporate Library and hardcopy files.
- Ensure information contained within the Colac Otway Shire Databases is maintained.
- Ensure the organisation's induction program is made available to all new staff.
- Ensure an induction program is made available to staff who transfer within the organisation.

How Performance Standards will be Measured

The Public Relations Co-ordinator will conduct quarterly audits of website and intranet information to ensure information is up to date, relevant and accurate. All Business Units are responsible for ensuring their information is correct and up to date.

The Public Relations Co-ordinator will regularly review brochures, directories, public documents, New Residents Kit and other publications to ensure availability, relevance and accuracy.

The Annual Report will be made available to our customers and residents.

Information Management Services Unit will conduct quarterly reviews to ensure staff are using TRIM effectively.

Performance will also be measured through the organisation's Performance Management process.

How Staff can improve their Performance

- Regularly review relevant web site and intranet pages and provide up to date, relevant and accurate information to the Public Relations Co-ordinator.
- Provide the Public Relations Co-ordinator with information to be included in media, brochures, public documents and other relevant publications.
- Contribute information to Council's Annual Report.
- Participate in training and refresher workshops on TRIM.
- Ensure all relevant incoming and outgoing corporate documents, correspondence, faxes, e-mails and information are stored in TRIM.

APPENDIX 2 - TELEPHONE PROTOCOLS

Section 1: PURPOSE

- (1) Colac Otway Shire staff make and receive many telephone calls each day. Telephone contact is one of the most important communication points for the Shire.
- (2) These protocols present basic guidelines for staff in terms of managing telephone calls and establishes some standards and practices with the use of technical features of telephone services. It aims to ensure that telephones are answered in a welcoming, consistent and informative manner that gives a positive and professional impression of the Shire.
- (3) To improve staff professionalism when managing customer enquiries over the telephone and to minimise the time taken to respond to and conclude an enquiry to the customer's satisfaction.

Section 2: POLICY STATEMENT

- (4) The Shire's policy is to answer all telephone calls in a welcoming and professional manner that conveys confidence to the caller that their enquiry is valued and that they will be acknowledged and responded to within a stipulated timeframe.

Part A – Telephone Answering Protocols

Initial Answering

- (5)
 - It is important that telephones are answered within three rings and that when you answer an external call you should welcome the caller using the following phrase *“Welcome to Colac Otway Shire, this is (first name)”*.

A professional manner and friendly tone of voice should be demonstrated.
 - Where appropriate, ask for the customer's name. Discretion needs to be used with this as some customers may wish to remain anonymous.
 - The system has provision for recording a phone call. If the call is external and is coming via the contact centre the caller will be aware that the call is being recorded. If they have contacted your extension directly you will need to advise them if you are going to record the call for privacy law purposes.

Placing a Call on Hold

- (6)
 - Always ask the customer's permission to put them on hold and thank them for waiting. Make sure you get back to the caller every 30 seconds and ensure the caller is to be placed on hold for no longer than 2 minutes.

Transferring a Call

- (7)
 - Always ask the customer's permission to transfer them to the appropriate officer. The customer should be advised who they are being transferred to and the area/department. Always advise the person you are transferring the call to of the caller's name and the nature of their enquiry to allow the staff member to be prepared.

If the officer is absent from their phone/office, advise the caller ***“they are unavailable”*** and offer to take a message or transfer the caller to the officer's voicemail.

Please note the officer is not “out to lunch”, “on their RDO”, “not here right now” or “around somewhere”.

- Customers should not be transferred more than once wherever possible.

Forwarding/Diversion of Calls

- (8)
- Calls should not be transferred more than once but if a staff member receives a call that has come to them in error and it is obvious that the caller has been transferred more than once then the staff member should take down the details and get an appropriate staff member of the Shire to return the call. The only exception to this should be where the recipient of the call can make direct and immediate contact with the correct staff member and there is certainty that the call will not have to be transferred again. Calls should not simply be redirected to reception.
 - Where a staff member is away from their workplace and in appropriate circumstances needs to use call forwarding, it is essential that the person to receive the calls is aware of that and is available and willing to take the calls.
 - Call forwarding to mobile telephones may be appropriate in particular circumstances and decisions need to be taken having regard to the need and urgency of the call. Note: Shire mobile phone numbers are not to be given out to the wider community.

Answering of Other Staff Phones

- (9)
- The telephone system is set up in such a way that common groups have the ability to answer each others phone easily and simply. If a phone call is not answered it will go to voicemail or an option to return to Customer Assist who can take a message and submit a MERIT request if appropriate.
 - It is ineffective to answer a telephone call in an area that you do not work unless your desk is close to another area and you have a good understanding of issues. It is more effective to allow the call to go to voicemail or transfer to Customer Assist who will then take the message and submit a MERIT request.

Ending a Call

- (10)
- Always thank the customer for calling and finish the call on a positive note. Where applicable ask the customer “Is there anything else I can help you with today?” For external calls allow the customer to hang up first.

Returning a Call

- (11)
- All calls should be returned within 2 working days wherever possible.

Voicemail

- (12)
- Voicemail allows customers to the Shire to leave detailed messages direct to the officer they wish to speak to – this saves time and also avoids errors in communication as a third party is not involved it is vital that this facility is used within the guidelines listed below to ensure quality Customer Service is delivered at all times.

Guidelines for managing your Voicemail.

1. Take note of the voicemail indicator light on your telephone
2. Check your Outlook regularly for voicemail
3. Once you receive a voicemail investigate the issue
4. Return call to customer within 2 working days with a resolution or further discussion

5. If you are going to be absent for more than 2 working days change your voicemail message to an extended absence message
6. Create a MERIT request if tracking required
7. File all information pertaining to the request in TRIM

It is your responsibility to ensure that your voicemail facility has a voice message that is relevant to your current circumstances. To ensure a professional image is portrayed to our customers the following scripted messages must be used by all officers.

The following script is to be used as your standard in a meeting and out of the office message;

“Welcome to Colac Otway Shire. You have reached the number of (name & title). I am currently unavailable. If you would like to be put through to a Customer Assist Officer press 0 or please hold to leave a message on my voicemail and I will return your call as soon as possible.”

If you are away from the office for more than 2 working days please use the following extended absence script.

“Welcome to Colac Otway Shire you have reached the number of (name & title). I am currently on leave and the (date). If the matter is urgent please press 0 to speak to (name) in my absence or leave a message on my voicemail and I will call you on my return.”

Part B – Role of Customer Services/Reception

- (13) • Customer Assist operates the general Shire telephone number 03 5232 9400. The role of this unit is to answer incoming calls to the Shire in an interested, warm and helpful manner and refer them to the appropriate officer within the Council. If they cannot resolve the enquiry at that point the unit assists both external callers and Shire staff with their general telephone enquiries.
- (14) • To undertake its role effectively the Customer Assist officers must be advised where there are significant changes or disruptions to unit telephones. For example where the entire staff of a unit will be away from their area (eg training, meeting) it is essential that the Unit be notified in advance. Also where a special interest issue has arisen that is likely to prompt increased calls to the Shire, the Unit should be briefed on the appropriate forwarding of the calls and advised of relevant information to provide to customers.

Part C – Responsibilities of Supervisors and Staff

- (15) • Managers/Supervisors are responsible for ensuring that all staff who have significant telephone answering duties attend training as required and are aware of the telephone procedures.
- (16) • Managers/Supervisors need to ensure that all phone calls are managed in a professional and consistent manner.

Managers/Supervisors need to ensure that officer’s voicemails are managed in a professional and consistent manner within the voicemail guidelines.
- (17) • Managers/Supervisors are responsible for ensuring that their units have in place procedures to manage calls, particularly where staff are absent from the workplace.
- (18) • In terms of use of Shire telephones for personal purposes, staff should adhere to the principles outlined in the Code of Conduct and also in the Operational Telephony Policy.

Part D – Mobile Telephones

- (19) • Approved staff are provided with mobile telephones by the Shire. Criteria and usage of mobile telephones are provided in the Operational Telephony Policy.

Part E – How Staff Can Improve their Performance – Summary

- (20) • Answer and return telephone calls promptly and identify yourself and the organisation.
- Treat all customers consistently and use a professional and friendly manner.
 - Ensure your voicemail message is current.
 - If you are going to be absent for more than 2 working days set your voicemail message to an extended leave message.
 - Take messages for other staff in your area and record in MERIT where appropriate.
 - Attend to all customers promptly.
 - Provide timely, useful and accurate information.
 - Listen to the customer's concerns.
 - Staff to respond to being paged in less than 1 minute.
 - Phone calls are returned within timeframe agreed with customer.
 - Be aware of the Dealing with Difficult Customer Behaviour clause in the Customer Services policy.