

City of Miami Beach

Service Shopper Program

Training Manual for Online Assessments

Last Revised December 2014

City of Miami Beach Service Shopper Program

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Service Shopper Program

I. What is the Service Shopper Program?

Goal: To be a key component of a broad, citywide initiative dedicated to improving customer service in the City of Miami Beach.

Objectives:

- To help assess how well the City is serving its customers by evaluating service delivery at interface points.
- Use program results as a tool for improving customer service to a level that meets the public's needs and expectations.
- Heighten customer service awareness and provide training to employees serving as shoppers.

Program Definition:

- Part time employees
- One type of service shopping evaluation method is used to measure and determine service delivery to the public at the point of service.
- Evaluation methods include telephone/recorded message
- Provide department feedback to assist in identifying weaknesses, developing corrective action, and recognizing City employees who provide exceptional customer service.

Shopping assignments, confidentiality, and conflicts of interest:

- Assignments are given with general instructions, with shoppers having the flexibility to script their own assignment. Service Shopper coordinator will provide general assignment information.
- Confidentiality is to be maintained at all times. Participants will adhere to strict confidentiality policies.
- Conflicts of interest must be reported immediately to ensure the objectivity of all participants and the impartiality of all shoppers.

Working hours: (a) department reporting, and (b) work schedule

- Telephone bank assignments are scheduled in four four-hour increments.
- Participants will pre-arrange with their supervisor and Service Shopper coordinator specific dates of participation. While at the phone bank, no personal calls or outside communication is permitted.

II. Shopping Methods Overview

Telephone/Recorded Message Shopping

Telephone Shoppers are volunteer City employees/NLAAA members posing as citizens requesting information/service from a City operation by telephone. Phone shopping may involve interaction with a live operator or an Interactive Voice Response (IVR) system. Assignments are given with general instruction, with shoppers given the flexibility to script their conversation in either English or Spanish. Shoppers will call a customer interface telephone number multiple times, each time with a different disposition. Structured evaluation forms are used to record customer service results. If an unacceptable rating is received, a shopper will re-shop the assignment at a later date. Shoppers will conduct assignments from a telephone bank and/or alternative location.

Telephone shoppers may convert to **Recorded Message Shoppers** in instances where they are transferred to a mailbox and leave a message. Recorded message shoppers will provide detailed information regarding the message recorded and Service Shopper coordinator will retrieve message/evaluate using established criteria. Assignments will come from the Resident Guide, Yellow Pages (Blue Book), and/or MB Website department directory.

III. PROGRAM SHOPPING METHOD INSTRUCTIONS / EVALUATION FORMS

Telephone Shopping Instructions

1. Arrive at IT Training Lab (1755 Meridian Avenue 3rd Floor) on agreed upon date and time assigned per outlook invite per assignment selection form. Each assignment is to be called one time with varied personas:
 - **Wrong number (see if employee will look up correct number)**
Example
Shopper: "Hello, I would like information on elderly services in the community"
Employee: "You have called the wrong number"
Shopper: "Can you give me the right number to call?"
 - **Nice call / Relevant information**
Example
Shopper: "Hello, I would like information on elderly services in the community"
Employee: "What type of information would you like?"
Shopper: "Can you give me information on social activities that I can attend during the day?"
 - **Relevant Information/ Nice call**
Example
Shopper: "Hello, I would like to better understand the budgeting process utilized by the city"
Employee: "What parts of the process are you interested in?"
Shopper: "The whole process from beginning to end"
Employee: "The process is rather lengthy, can you be more specific?"
 - **Problem caller**
Example
Shopper: "Hello, I would like information on elderly services in the community"
Employee: "What type of information would you like?"
Shopper: "I want everything"
Employee: "There are hundreds of services, can you be more specific?"
Shopper: "No."
2. Complete online customer service evaluation form for each phone call. Answer questions 1-9 (Question 10 – check box if return called requested). Provide detailed comments or use pull down menu.
3. MUST include NAME OF EMPLOYEE spoken to on telephone in comment section.
4. Submit completed customer service evaluation form by hitting the submit button at the end of the online form. All questions (except #10) must be answered and comments must be made.
5. Provide detailed information regarding recorded message left and information requested for Service Shopper Coordinator for return call message (include name used, question asked, and return phone number provided from those listed)

Telephone assignments are scheduled in four four-hour increments. Four telephone shopping assignments should be completed per hour. This is a minimum; most calls will take a shorter period of time, allowing shoppers to complete additional telephone shopping assignments.

MIAMI BEACH

SERVICE SHOPPER

Service Shopper Program

City of Miami Beach
Organizational Development
1700 Convention Center Drive
Miami Beach, FL 33139
Phone: 305.673.7020

[Home](#) |

Use the pull down to the right to select a
department to be shopped:



Qtr

Qtr4

[Done Shopping](#)

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Total Records available for this department: 6

Use the pull down to the right to select a department to be shopped:

Building Qtr

	ID	METHOD	SHOPTYPE	DEPARTMENT	DIVISION	LOCATION	SECTION	PHONE	ADDRESS
<input type="button" value="Select"/>	2	Telephone	Nice	Building	Main Line	Main Line	.	(305) 673-7610	1700 Convention Center
<input type="button" value="Select"/>	1012	Telephone	Problem	Building	Administration	Mariano Fernandez	Building Official/Director	(305) 673-7610 ext. 6288	1700 Convention Center Drive
<input type="button" value="Select"/>	866	Telephone	Wrong Number	Building	Operations	Antonio "Tony" Gonzalez	Building Operations Manager	(305) 673-7610 ext. 6716	1700 Convention Center Drive
<input type="button" value="Select"/>	4	Telephone	Wrong Number	Building	Main Line	Main Line	.	(305) 673-7610	1700 Convention Center
<input type="button" value="Select"/>	45	Telephone	Nice/Problem/Wrong Number	Building	Elevators	Wilfredo Medina	Chief Elevator Inspector	(305) 673-7610 ext. 6413	1700 Convention Center
<input type="button" value="Select"/>	70	Telephone	Nice/Problem/Wrong Number	Building	Permits Counter	RaShonda Blatch	Permitting Supervisor	(305) 673-7610 ext. 6621	1700 Convention Center

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Telephone Assignment

Shopping Year:	2015	Quarter:	Qtr4	WEB/REG/BB
Shop Method:	Telephone	Shop Type:	Wide	
Department:	Planning	Division:	Planning	
Assignment Phone Number:	(305)873-7550	Assignment Address:	1700 Convention Center	
Assignment Section/Function:		Contact:	Main Line	
Source:	578	Date Shopped:	12/11/2014	Time: 3:37:59 PM
Reshop Source:		Date Reshopped:		Reshop Time:

EVALUATION FORM

Evaluation Criteria: Critical Items(*) scoring a 1 will result in overall score of 1.

1. The telephone (main line #) was answered within 3 rings. * Voicemail-click recorded msg.

Recorded Message

Telephone was covered at all customer contact points during normal business hours and answered within the 3rd ring.

☐ 3 Rings or less
 ☐ 4 Rings
 ☐ 5 Rings
 ☐ 6 Rings
 ☐ No Answer and no answering machine

2. Any hold time was reasonable (if applicable). If no hold time select NA2.

☐ Less than 1 minute
 ☐ 1 - 2 minutes
 ☐ 2 - 5 minutes
 ☐ 5-10 minutes
 ☐ More than 10 minutes
 ☐ NA2

3. I was greeted in a courteous manner. *

Calls coming from external sources were answered with a consistent greeting including:

1- Salutation, 2- CMB(main line # only) or Dept. / Div 3- Name, 4- May I help you? "Good morning, City of Miami Beach, Budget Office, John Smith, may I help you?"

☐ All
 ☐ Missing 1
 ☐ Missing 2
 ☐ Missing 3-4
 ☐ No greeting

4. Employee listened and gave full attention; Showed patience, attentiveness and exhibited interest throughout the conversation.

☐ Extremely satisfied
 ☐ Very Satisfied
 ☐ Satisfied
 ☐ Somewhat satisfied
 ☐ Not satisfied

5. I was transferred to the appropriate extension. *

1-Employee requested permission from the caller before transferring the call, and 2- provided the caller with the name and number of the person being transferred to, and 3- Thanked the customer for calling and asked if further assistance was needed 4- If the transfer was not accomplished (busy, no answer or the person is unavailable), the employee reconnected with the caller and asked if they would like to leave a message (if possible).

☐ All
 ☐ Missing 1
 ☐ Missing 2
 ☐ Missing 3 but transferred to correct extension.
 ☐ Protocol not followed or transferred to wrong extension

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Recorded Message Assignment

Shopping Year:	2015	Quarter:	Qtr4	WEB/REG/BB
Shop Method:	Telephone	Shop Type:	Recorded Message	
Department:	Planning	Division:	Planning	
Assignment Phone Number:	(305)673-7550	Assignment Address:	1700 Convention Center	
Assignment Section/Function:		Contact:	Main Line	
Shopper ID:	578	Date Shopped:	12/11/2014	Time: 3:44:09 PM
Reshop Source:		Date Reshopped:		Reshop Time:

EVALUATION FORM

Evaluation Criteria: Critical Items(*) scoring a 1 will result in overall score of 1.

1. The recording answered in 4 rings.

<input type="radio"/> 4 Rings or less <input type="radio"/> Within 5 Rings <input type="radio"/> Within 6 Rings <input type="radio"/> Greater than 7 rings but recording did answer <input type="radio"/> No recording available to leave message	<input type="checkbox"/>
---	--------------------------

2. The recording was easy to understand. (Voice was clear, recording was concise.)

<input type="radio"/> Extremely clear/concise <input type="radio"/> Very clear/concise <input type="radio"/> Clear/concise <input type="radio"/> Somewhat clear/concise <input type="radio"/> Not clear/concise	<input type="checkbox"/>
---	--------------------------

3. Voicemail messages include employee's full name, optional phone number to call, and working hours if not Monday - Friday 9:00 AM - 5:00 PM. When employee is away for an extended period of time, the voicemail message will communicate such absence and offer an option for the caller.*

<input type="radio"/> Extremely clear <input type="radio"/> Very clear <input type="radio"/> Clear <input type="radio"/> Somewhat clear <input type="radio"/> Not clear	<input type="checkbox"/>
---	--------------------------

4. Message gave me clear instructions for leaving a return phone call message. I was able to leave a message for a return phone call.

<input type="radio"/> Extremely clear <input type="radio"/> Very clear <input type="radio"/> Clear <input type="radio"/> Somewhat clear <input type="radio"/> Not clear	<input type="checkbox"/>
---	--------------------------

5. Message gave me clear instructions for transferring to an actual person. I was able to transfer to an employee for additional assistance.

<input type="radio"/> Extremely clear <input type="radio"/> Very clear <input type="radio"/> Clear <input type="radio"/> Somewhat clear <input type="radio"/> Not clear	<input type="checkbox"/>
---	--------------------------

5. Message gave me clear instructions for transferring to an actual person. I was able to transfer to an employee for additional assistance.

☐ Extremely clear ☐ Very clear ☐ Clear ☐ Somewhat clear ☐ Not clear

6. I was satisfied with the results of my phone call. My questions were answered and/or I was able to easily obtain service.

☐ Extremely satisfied ☐ Very satisfied ☐ Satisfied ☐ Somewhat satisfied ☐ Not satisfied

7. Message gave sufficient information, and could not have been improved by speaking to a live person. Able to easily gain information or service through a recording.

☐ Extremely sufficient ☐ Very sufficient ☐ Sufficient ☐ Somewhat sufficient ☐ Not sufficient

8. The overall impression of my call was positive.

☐ Extremely positive ☐ Very positive ☐ Positive ☐ Somewhat positive ☐ Not positive

9. Return phone call (if requested) within 2 days.*

☐ Please check only if return call was requested

☐ Less than 1 day
 ☐ Within 2 days
 ☐ Within 3 days
 ☐ Within 4 days
 ☐ Not returned

COMMENTS. INCLUDE NAME OF EMPLOYEE SHOPPED AND INFORMATION REQUESTED. USE PULL DOWN COMMENTS IF APPLICABLE.

WHAT COULD THE EMPLOYEE HAVE DONE TO MAKE YOUR EXPERIENCE EVEN BETTER.

If return call requested, indicate return phone number provided and name given.

First and Name of the person(s) that assisted you:

☐

Evaluation Criteria Guidelines

1= Strongly Disagree

5=Strongly Agree

1. Drastically misses the criteria evaluated. Service is not provided, and/or employee is not knowledgeable, professional or courteous. It takes an excessive amount of time to obtain information, which is not accurate and no attempt is made by the employee to obtain correct information. Shopper is given the "run around" and unable to get correct telephone number. If telephone number is obtained, it takes an excessive amount of time to be answered, and/or the greeter is inattentive. Overall impression is unresponsive, not customer service oriented.
2. Minimally meets the criteria evaluated. Service is provided but not totally complete or accurate, and/or takes multiple attempts to obtain. Employee knows basic information and after prompting by shopper asks a supervisor to assist in providing service. Shopper is able to obtain correct telephone number after multiple attempts, which are answered after and extended period of time with minimal greeting. Overall impression is marginally acceptable, and customer service is provided after shopper persistence.
3. Meets the criteria evaluated. Service is provided adequately, timely and in a satisfactory professional manner. Employee is knowledgeable, providing accurate information and addressing the question and situation. Telephone number is obtained with some effort and is answered within an acceptable number of rings by an employee that greets caller. Employee is courteous. Overall impression is satisfactory, and customer service is provided as expected without incident.
4. Surpasses the criteria evaluated. Service is provided correctly and in a professional helpful manner. Employee is very knowledgeable, has patience and works with shopper to address their needs. Takes time to answer questions and refers to supervisor to correctly answer any unresolved issues. Service is provided quickly. Telephone number is easily obtained and is answered within a few rings by an employee that greets the caller in a professional manner. Employee is courteous and willing to provide assistance. Overall impression is above satisfactory, and customer service surpasses the expectations of the shopper.
5. Far exceed the criteria evaluated. Service is provided promptly and correctly. Employee is extremely knowledgeable and goes out of his/her way to help shopper accomplish objective. Employee uses initiative to assist shopper and follows-up to provide information on other City services that would benefit shopper. If needed, employee refers to supervisor, who is also helpful and able to assist shopper. Telephone number is easily obtained and is answered within a few rings by an employee that greets the call in a friendly and professional manner. Employee is able to immediately direct phone call to correct individual. Overall impression is exceptional, and customer service far surpasses the expectations of the shopper.

IV. Customer Service Standards

Telephone

- Telephones will be covered at all customer-contact points during normal business hours answering within the third ring.
- Phone messages received will be responded to (if requested) in a timely manner, two business days, even if just to acknowledge receipt. An estimate of time to resolve the problem to be given if applicable.
- Calls coming from external sources will be answered with a consistent greeting such as "Good morning, City of Miami Beach, John Smith, may I help you?"
- Employee will take responsibility for providing a solution and/or options to the customer's request.
- Request permission from the caller before transferring a call, provide the caller with the name and number of the person being transferred to, and stay on the line to announce the caller to the person receiving the transfer. If the transfer cannot be accomplished (busy, no answer or the person is unavailable), the employee will reconnect with the caller and ask if they want to leave a message.
- Voice mail messages will include employee's full name, working hours, and optional phone number to call. When employee is away for an extended period of time, the voice mail message will communicate such absence and offer an option for the caller.
- Thank the customer for calling and ask if further assistance is needed prior to concluding the call.

Written Correspondence

- Correspondence start with a greeting
- E-mail signatures (e-mail) will include the name, title, department, division, and contact number.
- Activate the e-mail Out-of Office Assistance when away from the office for an extended period of time.
- Acknowledge e-mails and faxes that require a response within two business days.
- Respond to letters within 10 business days.
- Use correct spelling and grammar, including accurate name and address.
- Provides complete, accurate, and precise information regarding their inquiry.
- Fax cover sheets will be legible and include name, telephone number, and the name and fax number of the receiver.

Personal Contact

- Respond to customers in a courteous manner... the customer is not always right, but always deserves to be treated with respect.
- Provide accurate and understandable solutions/options to customer requests or directs the customer to the appropriate person who may have knowledge in the subject matter.
- Average or maximum wait time without an appointment should be no longer than 30 minutes or scheduled for a mutually convenient time.
- Counter will be staffed during business hours.
- Employees will dress in attire that is professional, tasteful, appropriate and consistent with the individual departmental policies.

Monitoring our Standards

- Our customer service team will oversee all customer service standards.
- If we do not meet our standards, we will implement an action plan to improve our service.
- We will listen and do all we can to resolve issues.
- For questions and/or concerns, contact 305-604-CITY.

V. DEPARTMENT / DIVISION LISTING

Department Listing & Sample Questions

LOCATION	EXAMPLES OF QUESTIONS TO ASK
Police Department	<i>Look below for correct Division</i>
Records Unit	<ol style="list-style-type: none"> 1. How do I get a copy of my report? 2. Does the police department provide fingerprinting service? 3. Will the department issue me an ID card? 4. How many false alarms is a Miami Beach homeowner allowed?
Property Room	<ol style="list-style-type: none"> 1. Where is my property and how can I get it back? 2. How can I get my vehicle back? 3. Where is your department located?
Off Duty Office	<ol style="list-style-type: none"> 1. How much does it cost to hire and off duty police officer? 2. What does and off duty officer provide with hired? 3. What is the process to hire an off duty officer?
Patrol Division	<ol style="list-style-type: none"> 1. Does the department have a ride along program? 2. What is the law are regarding loud vehicle alarms? 3. How do I comply with a traffic citation?
Report Control	<ol style="list-style-type: none"> 1. May I visit someone detained in your Jail? 2. What is the process to visit someone detailed in your jail?
Parking Department	<i>Look below for correct Division</i>
Parking/ Meters/IParks	<ol style="list-style-type: none"> 1. How do I purchase an IPark? 2. Are there parking meter discounts for residents only? 3. Can I reload my IPark online? 4. Where can I pay for a parking situation?
Parking/ Permits	<ol style="list-style-type: none"> 1. Where do I get a citywide permit? 2. Where do I get a residential parking permit? 3. What do I need to bring with me to prove residency?
Parking/ General	<ol style="list-style-type: none"> 1. What information do I need to have a vehicle towed? 2. What do I do about a broken parking meter? 3. Where are you located, and what

	<p>are your hours?</p> <ol style="list-style-type: none"> Where can I get a handicap parking decal? Where can I park on special events?
Building Department	<ol style="list-style-type: none"> Why do I need a building permit? How do I get a building permit? I am a general contractor, what information should I submit to register my license with the City? What is required for a final Certificate of Occupancy?
Code	<ol style="list-style-type: none"> Can I have a satellite dish? Can I put a for sale or rent sign in front of my property? Can I keep a boat or trailer in my yard?
Planning Department	<ol style="list-style-type: none"> How high can a fence be around property? What kinds of fences are allowed? Do I need a permit to paint my own house? Can I paint my house any color I want?
Sanitation	<ol style="list-style-type: none"> When is my garbage picked up? I have an old couch & refrigerator. How can I get rid of it? Is there a price for a recycle garbage can?
Public Works Department	<ol style="list-style-type: none"> Are water restrictions still in effect? Who takes care of knocking down the coconut trees along the City? Who can I talk to in regards to a hole in the sidewalk of street I live on?
Recreation	<i>Look below for correct locations</i>
Scott Rakow Youth Center	<ol style="list-style-type: none"> Do you have adult swim programs? Can I rent your facility for a party? Do you offer swimming lessons for kids?
21 st Street Recreation Center	<ol style="list-style-type: none"> Do you have dance classes for adults? What programs do you have for people with disabilities? Do you have summer camp for elementary students?
North Shore Community Center	<ol style="list-style-type: none"> Can you rent the Band Shell? Do you offer any activities for seniors? Where are you located? How can I get to your place?

South Point Park	<ol style="list-style-type: none"> 1. Do you have access to the beach for persons with disabilities? 2. Can I bring my dog to the park? 3. Do I need permit for a photo shoot?
City Clerk	<ol style="list-style-type: none"> 1. How can I get a video tape of a commission meeting? 2. When is the next commission meeting? 3. How can I speak at a commission meeting? 4. How can I find out if my property has a lien?
Human Resources	<ol style="list-style-type: none"> 1. How do I apply for a job? 2. What jobs do you have available? 3. Can I mail in my resume?
Fire Department	<p><i>All Locations have the same question</i></p> <ol style="list-style-type: none"> 1. How many fire extinguishers do I need for my building? 2. Does the Fire Station Test Extinguishers? 3. Do I need smoke alarms for my home? 4. Can I get my blood pressure checked?
Community Resource	<ol style="list-style-type: none"> 1. Graffiti Complaints 2. How do I get a dead animal removed? 3. What the City is doing with the growing community of wild cats?
Economic Development	<ol style="list-style-type: none"> 1. How do I start a business? 2. What office space is available on South Beach? 3. Does the City have any land it wants to sell? 4. What is redevelopment?
Ocean Rescue	<ol style="list-style-type: none"> 1. Are dogs allowed on the beach? 2. Can you drive on the beach? 3. Where are BBQ and picnic areas? 4. How long is the beach? 5. Where is South Beach?
Procurement Division	<ol style="list-style-type: none"> 1. What do I have to do to sell my services to the City? 2. My daughter is getting married; can I take pictures on the beach? 3. How do I become a vendor for the City?
Finance Department	<i>Look below for correct division</i>
License Division	<ol style="list-style-type: none"> 1. How do I apply for an occupational license? 2. How do I register for a fictitious name?

	<ol style="list-style-type: none"> 3. Can I have a home- based business? 4. What do I need to open a home-based business?
Utility Billing	<ol style="list-style-type: none"> 1. I am planning on moving to Miami Beach, what document do I need to connect my water service? 2. Can I pay my water bill online? 3. What is the address to go and pay my water bill?
Resort Tax	<ol style="list-style-type: none"> 1. What is the resort tax for a new restaurant? 2. Can I pay the resort tax of my business in the City Hall?
Organization Development Performance Initiatives, ODPI	<ol style="list-style-type: none"> 1. I am a student working on my thesis and would like to know the trainings City employees have to take. 2. Where can I find the survey for this year? 3. Does the City measure the cleanliness of the City?
OBPI, Budget	<ol style="list-style-type: none"> 1. I would like to know where I can find in your website the budget for this year. 2. I would like to know the budget from previous years. Where can I go? 3. I need to know about the taxes for my home. Can you help me?
Emergency Management	<ol style="list-style-type: none"> 1. Where can I find shelter if there is a hurricane heading to MB? 2. Is the City prepared in case of a tsunami? How soon we will be notified? 3. What phone number can I call in case of an emergency in MB?
Transportation	<ol style="list-style-type: none"> 1. I would like to know where to take the trolley and if it is free of charge. 2. Where can I get information of bus stops? 3. How often the trolley is supposed to arrive at the bus stop?
City Manager's Office	<ol style="list-style-type: none"> 1. When is the next commission meeting? 2. Where can I find the names of commissioners for the City? 3. Can I send an email to the City Manager?

