



# City of San Antonio

## Agenda Memorandum

**File Number:**17-5678

---

**Agenda Item Number:** 6.

**Agenda Date:** 10/17/2017

**In Control:** Audit and Accountability Committee

---

**AUDIT COMMITTEE SUMMARY**  
**October 17, 2017**  
**Audit of 311 Customer Service**  
Report Issued September 22, 2017

### **Audit Objective**

Determine if staffing is adequate and appropriately scheduled, workflow is effectively designed and functioning, and IT system controls are effective.

### **Background**

The City of San Antonio's 311 Call Center connects citizens with customer service representatives ready to assist with City service requests such as pothole repairs, stray animals, downed street signs, trash collection and other City requests. The 311 Call Center is staffed with 39 authorized positions which includes 5 management positions, 2 specialists, 1 management analyst and 31 customer service representatives.

Service requests can be communicated via a phone call with a 311 representative or by submitting a service request through internal or external websites or through the 311 mobile application.

The 311 Call Center utilizes the Customer Relationship Management (CRM) system as the City-wide intake system for all customer service requests. It was designed to enhance customer service by improving communications, data tracking, and reporting.

### **Audit Scope & Methodology**

The audit scope was from October 2015 through March 2017.

We reviewed City Administrative Directives and 311 Call Center policies and procedures. For Customer Relationship Management (CRM) system general controls testing, we referred to the Government Accountability Office's (GAO) Federal Information System Controls Audit Manual (FISCAM).

We interviewed 311 Management and staff to gain an understanding of 311 call center operations and workflow. We also interviewed ITSD staff regarding the management of the CRM system and the

data flow with department databases.

## **Audit Conclusions**

Overall, internal controls need improvement to ensure that the 311 call center is operating effectively and efficiently to address citizen concerns. Specifically,

- Information that is used by service representatives to answer citizen service requests was not always accurate and/or current.
- 311 online tools are difficult to use contributing to minimal use by citizens.
- 311 Management does not consistently follow up on service requests that require further action.
- Staff scheduling is not reflective of historic call volume and is not sufficient to adequately meet the peak call volume demand.
- 311 Management does not have documented/meaningful performance metrics that they are required to report for the department.
- 311 call center representatives are not being held accountable for individual key performance measures.
- Customer Relationship Management (CRM) system user access is excessive.

The 311 Call Center management agreed with our observations and has developed positive action plans to address them.