Serving our customers

Customer Services

2024 GP-12 Report Out

TACOMA PUBLIC UTILITIES

Challenges in 2024

- **Telephony System Issues**
  - Customer Services encountered significant telephony issues, hindering our ability to consistently connect, support, and route customers to the appropriate resources for four months.
  - Unable to record customer calls, impacting coaching, feedback, and staff training efforts for a majority of 2024.

- **Strategic Resource Commitments**
  - Allocating sufficient resources was critical to capturing requirements, processes, and pain points to successfully transition from our 20+ year-old Customer Service application to the new SAP Service Cloud CRM.

- **Returning to Office Logistical Issues**
  - Staff space requirements, equipment relocation, and telephony needs had to compete with other groups within the utility also returning to the office simultaneously.

- **Realigning Resources to Support the CXEA Reorganization**
  - Extended turn around time for position reviews and structures slowed the roll out of the new Customer Experience and External Affairs organizational structure.

Accomplishments

- **Enhanced Customer Feedback**
  - Changes in how customers participated in post call surveys resulted in increased feedback rate from 1.8% of customers to 13.1% of customers.

- **Increased Customer Satisfaction**
  - Based on 18,425 completed Customer Post Call Surveys customers reported a satisfaction score of 4.3 on a five point scale in 2024. This was up from a score of 3.9 in 2023.

- **Improved First Call Resolution (FCR)**
  - FCR increased from 73.6% in 2023 to 77.1% in 2024. This increased eliminated approximately 11,000 additional customer calls.

- **Customer Program Enrollment**
  - Increased enrollment in BCAP from 781 at the beginning of 2023 to over 10,000 by the end of 2024.
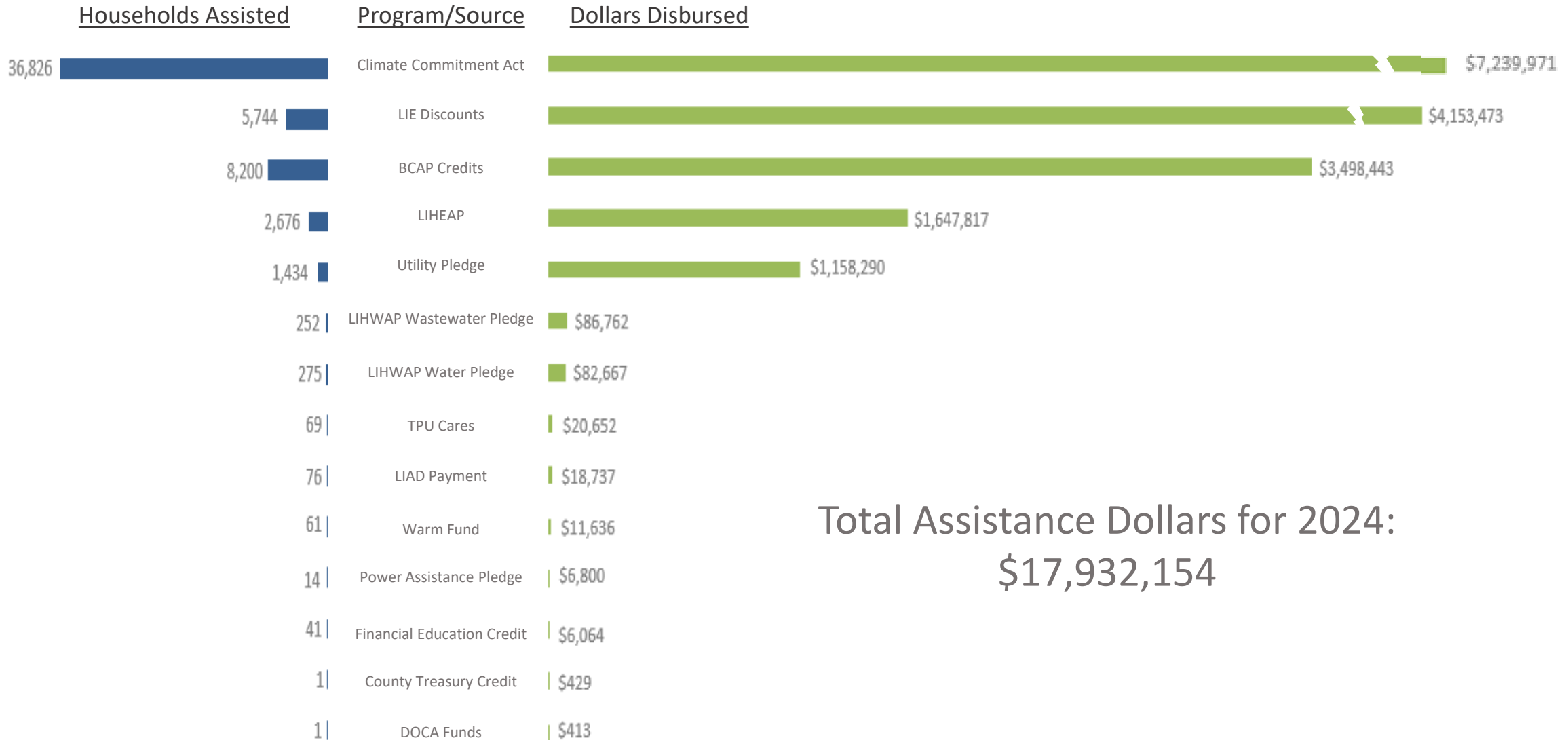
- **Completed Business Process Documentation for 2025 Service Cloud CRM**
  - Documented existing business process, pain points, policy requirements and reporting needs for the 28 most critical processes to support our Customers.

Customer Assistance Dollars

Households Assisted and Dollars Disbursed for 2024

Households Assisted	Program/Source	Dollars Disbursed
36,826	Climate Commitment Act	$7,239,971
5,744	LIE Discounts	$4,153,473
8,200	BCAP Credits	$3,498,443
2,676	LIHEAP	$1,647,817
1,434	Utility Pledge	$1,158,290
252	LIHWAP Wastewater Pledge	$86,762
275	LIHWAP Water Pledge	$82,667
69	TPU Cares	$20,652
76	LIAD Payment	$18,737
61	Warm Fund	$11,636
14	Power Assistance Pledge	$6,800
41	Financial Education Credit	$6,064
1	County Treasury Credit	$429
1	DOCA Funds	$413

Total Assistance Dollars for 2024:
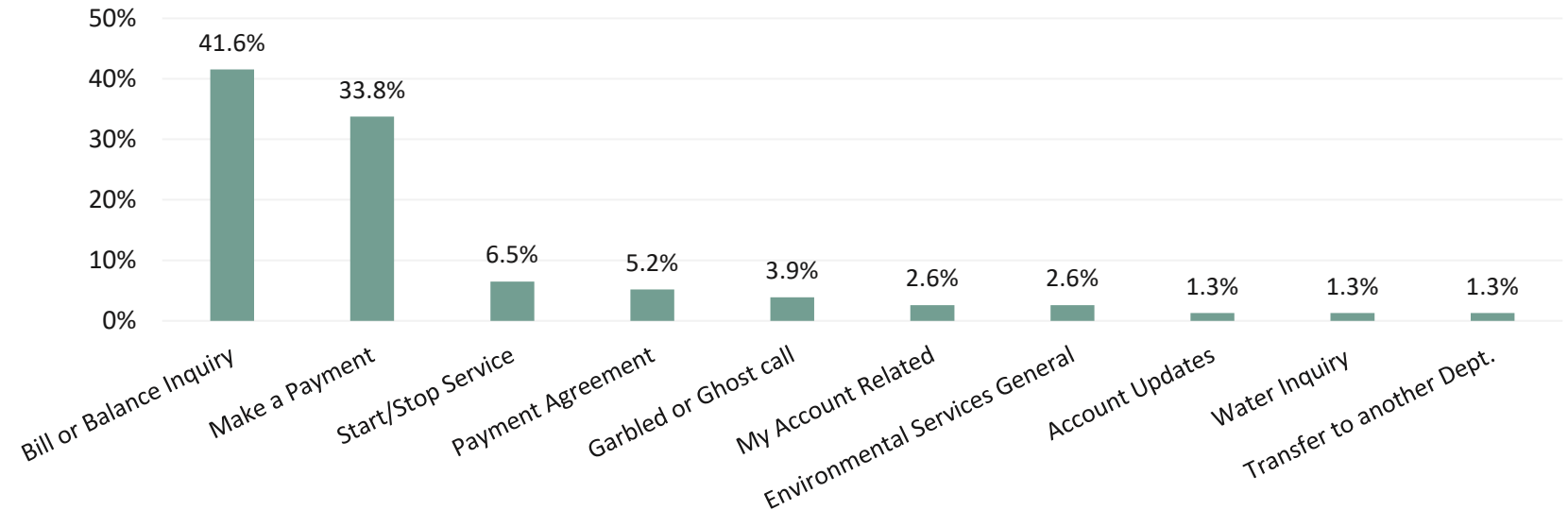$17,932,154

Contact Center

Customer Surveys

⇑ 264%

Increase in the amount of post call surveys completed by customers in 2024 versus 2023.

- Completion of post call surveys increased from 1.8% in 2023 to **13.1% of calls in 2024.**

- **18,425** = Total number of post call **surveys completed in 2024**.

• Customer Call Types for 2024

Chart: Customer Call Types for 2024
- Bill or Balance Inquiry: 41.6%
- Make a Payment: 33.8%
- Start/Stop Service: 6.5%
- Payment Agreement: 5.2%
- Garbled or Ghost call: 3.9%
- My Account Related: 2.6%
- Environmental Services General: 2.6%
- Account Updates: 1.3%
- Water Inquiry: 1.3%
- Transfer to another Dept.: 1.3%

• First Call Resolution

FCR increased to 77.1% in 2024. This increase negated approximately 11,000 additional customer calls.

• Non-Phone Support in 2024

- 10,801 Service Orders
- 3,042 TPU MyAccount Orders
- 7,622 Zendesk Orders

Lobby and In Person Channels

Lobby Visits

⬆ **36.9%**

Customers visits to the TPU lobby compared to pre-pandemic levels.

- 22,215 = Total number of lobby visits in 2019

- **30,404** = Total number of **lobby visits in 2024**

- **$53.8 million collected by Lobby staff and TPU Payboxes in 2024**

- **Shift in reasons customers behind customer lobby visits**
  - Pre-pandemic data shows less visits but more payments collected via the lobby.
    - 2019 = lobby staff processed $42.5 million in payments
    - **2024 = lobby staff processed $26.4 million in payments**
  - 2024 data indicates customers are coming to the lobby for more complex matters.

- **TPU Paybox Revenue Collected**
  - TPU Paybox kiosks provide customers who prefer "in-person" payment options with greater flexibility, allowing them to make payments outside of standard lobby hours.
    - Popular channel for unbanked, underbanked or cash customers.
    - **2024 = TPU Payboxes processed $27.4 million in payments**

PayBox Payments by Tender Type 2023 - 2024

2,043, 2%
53,859, 46%
60,517, 52%

■ Card Payments ■ Cash Payments ■ Check Payments
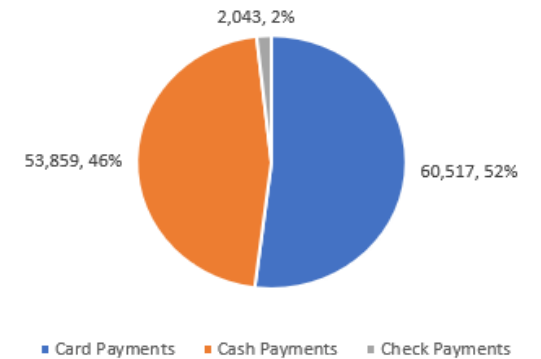
PayBox Revenue by Tender Type 2023 - 2024

713,198, 3%
12,331,517, 45%
14,383,180, 52%

■ Card Revenue ■ Cash Revenue ■ Check Revenue
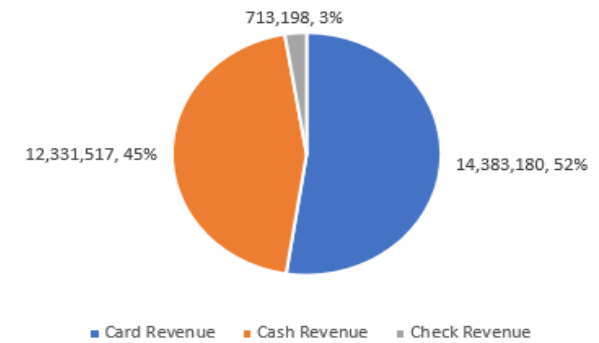
Key Performance Indicators / Metrics

- **Key Performance Indicators (KPIs) and individual metrics employed by Customer Services are being revised to align with the purpose of the organization with a focus on the customers perception of the service we provide.**

- **Examples of Metrics/KPIs for 2025**
  - Call Center Measures
    - **Service Level** – Percentage of calls answered within a set period of time
    - **Post Transaction Survey / North Star** – Average customer satisfaction rating provided by the customer
    - **Availability** – Percentage of time an agent is on a call or available to take an incoming call
    - **Efficiency** – Related to Adherence
    - **Quality** – Score related to call or interaction quality

  - Agent Measures
    - **First Call Resolution** – Percentage of customers who complete their tasking during first interaction
    - **Schedule Adherence** – Percentage of time an agent is working on the task assigned
    - **Quality** – Individual score related to call or interaction quality
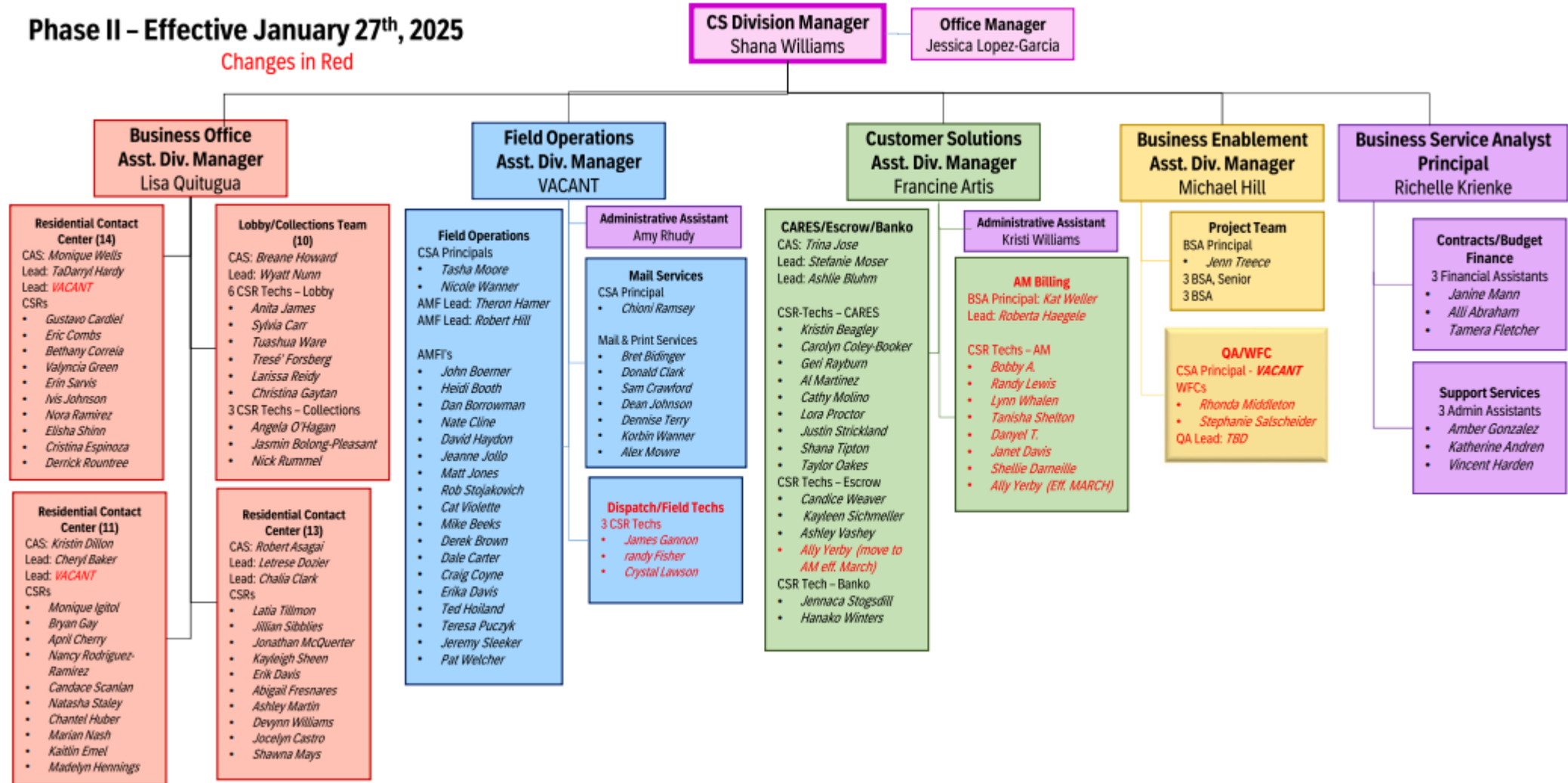
Customer Service Realignment

Phase II – Effective January 27th, 2025
Changes in Red

CS Division Manager
Shana Williams

Office Manager
Jessica Lopez-Garcia

Business Office Asst. Div. Manager
Lisa Quitugua

Residential Contact Center (14)
CAS: *Monique Wells*
Lead: *TaDarryl Hardy*
Lead: *VACANT*
CSRs
- *Gustavo Cardiel*
- *Eric Combs*
- *Bethany Correia*
- *Valyncia Green*
- *Erin Sarvis*
- *Ivis Johnson*
- *Nora Ramirez*
- *Elisha Shinn*
- *Cristina Espinoza*
- *Derrick Rountree*

Lobby/Collections Team (10)
CAS: *Breane Howard*
Lead: *Wyatt Nunn*
6 CSR Techs – Lobby
- *Anita James*
- *Sylvia Carr*
- *Tuashua Ware*
- *Tresé' Forsberg*
- *Larissa Reidy*
- *Christina Gaytan*
3 CSR Techs – Collections
- *Angela O'Hagan*
- *Jasmin Bolong-Pleasant*
- *Nick Rummel*

Residential Contact Center (11)
CAS: *Kristin Dillon*
Lead: *Cheryl Baker*
Lead: *VACANT*
CSRs
- *Monique Igitol*
- *Bryan Gay*
- *April Cherry*
- *Nancy Rodriguez-Ramirez*
- *Candace Scanlan*
- *Natasha Staley*
- *Chantel Huber*
- *Marian Nash*
- *Kaitlin Emel*
- *Madelyn Hennings*

Residential Contact Center (13)
CAS: *Robert Asagai*
Lead: *Letrese Dozier*
Lead: *Chalia Clark*
CSRs
- *Latia Tillmon*
- *Jillian Sibblies*
- *Jonathan McQuerter*
- *Kayleigh Sheen*
- *Erik Davis*
- *Abigail Fresnares*
- *Ashley Martin*
- *Devynn Williams*
- *Jocelyn Castro*
- *Shawna Mays*

Field Operations Asst. Div. Manager
VACANT

Administrative Assistant
Amy Rhudy

Field Operations
CSA Principals
- *Tasha Moore*
- *Nicole Wanner*
AMF Lead: *Theron Hamer*
AMF Lead: *Robert Hill*

AMFI's
- *John Boerner*
- *Heidi Booth*
- *Dan Borrowman*
- *Nate Cline*
- *David Haydon*
- *Jeanne Jollo*
- *Matt Jones*
- *Rob Stojakovich*
- *Cat Violette*
- *Mike Beeks*
- *Derek Brown*
- *Dale Carter*
- *Craig Coyne*
- *Erika Davis*
- *Ted Hoiland*
- *Teresa Puczyk*
- *Jeremy Sleeker*
- *Pat Welcher*

Mail Services
CSA Principal
- *Chioni Ramsey*

Mail & Print Services
- *Bret Bidinger*
- *Donald Clark*
- *Sam Crawford*
- *Dean Johnson*
- *Dennise Terry*
- *Korbin Wanner*
- *Alex Mowre*

Dispatch/Field Techs
3 CSR Techs
- *James Gannon*
- *randy Fisher*
- *Crystal Lawson*

Customer Solutions Asst. Div. Manager
Francine Artis

Administrative Assistant
Kristi Williams

CARES/Escrow/Banko
CAS: *Trina Jose*
Lead: *Stefanie Moser*
Lead: *Ashlie Bluhm*

CSR-Techs – CARES
- *Kristin Beagley*
- *Carolyn Coley-Booker*
- *Geri Rayburn*
- *Al Martinez*
- *Cathy Molino*
- *Lora Proctor*
- *Justin Strickland*
- *Shana Tipton*
- *Taylor Oakes*
CSR Techs – Escrow
- *Candice Weaver*
- *Kayleen Sichmeller*
- *Ashley Vashey*
- *Ally Yerby (move to AM eff. March)*
CSR Tech – Banko
- *Jennaca Stogsdill*
- *Hanako Winters*

AM Billing
BSA Principal: *Kat Weller*
Lead: *Roberta Haegele*

CSR Techs – AM
- *Bobby A.*
- *Randy Lewis*
- *Lynn Whalen*
- *Tanisha Shelton*
- *Danyel T.*
- *Janet Davis*
- *Shellie Darneille*
- *Ally Yerby (Eff. MARCH)*

Business Enablement Asst. Div. Manager
Michael Hill

Project Team
BSA Principal
- *Jenn Treece*
3 BSA, Senior
3 BSA

QA/WFC
CSA Principal - *VACANT*
WFCs
- *Rhonda Middleton*
- *Stephanie Salscheider*
QA Lead: *TBD*

Business Service Analyst Principal
Richelle Krienke

Contracts/Budget Finance
3 Financial Assistants
- *Janine Mann*
- *Alli Abraham*
- *Tamera Fletcher*

Support Services
3 Admin Assistants
- *Amber Gonzalez*
- *Katherine Andren*
- *Vincent Harden*

GP-12 Metric

Phone Service Level

49.0%

of 295,686 inbound customer calls from January 1st, 2024 through December 31st, 2024 were **answered by a live agent within 30 seconds** and did not meet the target goal of 75% or more.

- Phone Service levels decreased slightly by 1.8 percentage points and did not meet the established target.
- Average daily call volume is 5.1% lower than what was observed in 2023.

Average Speed of Answer

175 Seconds

The **average amount of time customers waited to speak to a live agent** after exiting the self service automated phone system from January 1st, 2024 through December 31st, 2024 and did not meet the target goal of 60 seconds or less.

- The overall ASA decreased 7 seconds compared to 2024 but did not meet the established target.
- The Average Speed of Answer in 2024 ranged from 57 to 293 seconds.

Percent of Customer Invoices mailed within 3 days

95.0%

of customer invoices generated from January 1st, 2023 through December 31st, 2023 were **printed and mailed within 3 days of the meter read**

2025 Goals

- ## Customer Focused Metrics and KPIs
  - Replace our current KPI and Metrics with those focused on the realignment of the organization and customer expectations.

- ## Bill Credit Assistance Program (BCAP) Review
  - Revisit program income limits and application process to ensure the program is meeting the needs of our customers.

- ## Build and implement SAP Service Cloud as part of the SAP Now program
  - Replace of our aging, 20+ year old customer service platform used to support our customers with a modern CRM solution as part the SAP Now program and SAP S/4 Upgrade.

- ## Installation of QA Program
  - Installation of a new QA program that aligns with the goals of our North Star vision and places the customer at the forefront of what we do.

- ## Telephony Modernization
  - Identify and select a telephony solution that will provide better reliability, increased functionality and streamlines back end support needs.