

September 5, 2012

Re: Request for Qualifications – Professional Services – Customer Service Refresher Training Facilitator

The City of Concord is soliciting your interest in submitting a Request for Qualifications for professional services. The City desires to undertake a refresher training project for its coworker-led customer service initiative. Addendum #1 attached has more detail about the initiative. Addendum #2 addresses services desired.

If you are interested, please respond to the City of Concord Purchasing Manager, Sid Talbert, by Friday, September 21, 2012, 5:00 p.m.

The response, of no more than 25 pages, from your firm shall include the following:

1. *Specialized experience and technical competence.*
2. *History and capabilities of the firm.*
3. *Scope of work to be performed and time frame.*
4. *Firm's proximity to and familiarity with the area.*
5. *References.*
6. *Other pertinent information, as applicable.*

The envelope should be clearly marked “Customer Service Refresher Training Qualifications” on the outside. The City is requesting that 6 copies be delivered/mailed to Sid Talbert, Purchasing Manager, City of Concord, PO Box308, 26 Union Street South, Concord, NC 28026-0308. A personal interview may be requested by the City to be held during the selection processes. The firm will be selected at a Concord City Council, date to be determined in the latter months of 2012. The Council will receive a recommendation from the City Manager based on review input provided by the City’s Customer Service Design Team and the Economic Development & Sustainability Director.

Sincerely,

Jeff Young, Director  
Economic Development & Sustainability

## ADDENDUM #1 for RFQ

In July of 2007, the City of Concord began an initiative to pursue excellence in customer service throughout the organization, both internally among the City's departments and externally with customers from the general public. It was led by 25 coworkers representing each of the City's departments. The group is known as the Customer Service Design Team. It excludes department directors or City management, except for one director serving as an ongoing facilitator. Initially that facilitator was the Human Resources Director. In 2010, the City Manager passed the facilitation role to the Economic Development & Sustainability Director.

To begin the effort, a professional outside trainer, Tom Westall of "Lead for Life" was retained to guide and prepare the group for its charge. Through weekly meetings over the course of many months, members of the group under Tom Westall's leadership, discussed the state of the City's customer service, reviewed the City's mission statement and core values then set forth "The 9 Principles of Excellent Customer Service" which are attached as Addendum #4. The "Design Team" proceeded to develop four key programs to address customer service in the organization and recognize coworkers going above and beyond in providing excellent customer service. Those four initiatives are:

1. The "STAR" Program (Special Thanks And Recognition) to recognize outstanding customer service provided by individual coworkers or groups of coworkers;
2. "Journey Through Concord" to expose interested coworkers from any department to activities and facilities in all City departments through a class/field trip format;
3. Internal department customer service teams led or initiated by the Design Team representative from the respective department; and
4. Establishment of the "TEAM CONCORD" concept.

In addition to these specific programs, Tom Westall and the Design Team conducted training sessions for all City coworkers to explain and promote the initiatives.

In 2011, the Design Team perceived that its initial programs were declining somewhat and that customer service needed a boost throughout the organization. At the same time, some original Design Team members were rotating off and new members needed additional training. In response to a request from the Design Team, City Council approved retaining an outside professional facilitator to conduct refresher training with the Design Team and throughout the organization. There was a modest allocation adopted for this purpose in the FY 12-13 budget.

The refresher training is intended to build upon the extensive work that has already been accomplished and not to replace or redo what has been done. In general terms, the objectives are to assess the current state of the City's customer service and to develop and conduct training to address identified needs, including providing tools for future use by the Design Team and departmental internal customer service teams.

## ADDENDUM #2 for RFQ

These are the basic services required of the firm.

### Planning Phase

This phase involves those activities required for planning and defining the scope of the project and establishing preliminary requirements. Some examples of activities within this phase of the project include:

1. Confering with project team on project requirements, financing, schedules, early phases of the project, project deliverables and other pertinent matters;
2. Planning, procuring, and/or preparing necessary surveys, secret shopper strategy, and related customer service studies required for the project;
3. Developing the detailed project strategy, research components, project tasks, specific deliverables, and post-project follow-up plans;
4. Determining the nature and scope of training to be provided to City coworkers;
5. Developing a training schedule based on input from all City departments accommodating their scheduled respective training unrelated to this project; and
6. Securing project team written approval of all preliminary project elements.

### Research Phase

This phase includes all activities required to compile detailed base data and research on current City of Concord customer service practices and the “state of the art” in municipal customer service in North Carolina and the nation. Examples include:

1. Compilation of a summary of excellent customer service practices, procedures, training and reinforcement in use by other municipalities in NC and the US;
2. Development of a survey to be administered to City customers concerning satisfaction with procedures, coworker accessibility, and fulfillment of the 9 principles of Customer Service;
3. Secret shopper experiences to determine the quality level of current customer service provided by City departments;
4. Tailoring training materials to unique department needs where applicable; and
5. Reviewing all final plans with project team for final written approval.

## Implementation Phase

This phase includes implementation of all services planned in the preceding two phases.

Examples include:

1. Surveying City customers;
2. Executing secret shopper investigations;
3. Preparing a summary report of the surveys and secret shopper experiences and integrating findings into training to address deficiencies;
4. Conducting training sessions;
5. Development of individualized post-project training materials for future use by City departments to reinforce training accomplished during project; and
6. Providing metrics for future assessment of ongoing customer service performance of City departments with data from this project serving as the baseline.

The primary contact for the City of Concord will be:

Jeff Young, Economic Development & Sustainability Director  
[youngj@concordnc.gov](mailto:youngj@concordnc.gov) or 704.920.5121.

The project team will be comprised of:

1. Economic Development & Sustainability Director, Jeff Young;
2. Customer Service Design Team Sub-team Leads, Bethany Ledwell, Bill Leake, Kim Deason and Tammy Linn; and
3. Public Affairs & Projects Manager, Peter Franzese

ADDENDUM #3 for RFQ

**Preliminary Rating Matrix**

<b>Factors</b>	Firm	Firm	Firm
<b>Rate 0 - 10</b>			
1. Experience & technical expertise			
2. Past record of performance			
3. Capacity of Firm to Perform work			
4. Customer Service expertise of firm			
5. Municipal customer service experience			
5. Ability to work with City staff			
6. Ability to work within time frame			
9. References			
10. Interview			
<b>TOTAL</b>			
<b>RANKING</b>			

Finding of \_\_\_\_\_

## ADDENDUM #4 for RFQ - **The 9 Principles of Excellent Customer Service**

### **1. Concern for the Individual**

- Make people feel important and welcome
- Remember people (names/faces)
- Demonstrate empathy
- Show patience and caring

### **2. Professional Service**

- Make a positive first impression
- Know your job and take pride in it
- Maintain a professional image
- Provide good service consistently
- Pay attention to detail - the “little things”

### **3. Timeliness**

- Handle customer requests/concerns in a timely manner
- Be efficient and effective
- Be on time
- Respond promptly to calls and e-mails
- Don't waste people's time

### **4. Customer Focus**

- Treat people like you would like to be treated
- Anticipate customer needs
- Treat people like you are their partner/advocate
- Go the “extra mile”

### **5. Effective Communications**

- Be positive and friendly
- Be a good listener
- Keep people updated and informed
- Be honest - If you don't know the answer be “up front” about it

### **6. Teamwork**

- Provide seamless service between departments
- Treat co-workers with respect and dignity
- Support “Team Concord” philosophy

### **7. Fair and Equitable Service**

- Treat every person with respect
- Be sensitive to the situation
- Apply policies evenly and fairly

### **8. Taking Ownership**

- Take personal accountability – don't “pass the buck”
- Provide accurate information
- Follow –up with the customer
- Deliver on promises made

### **9. Great Service Recovery**

- Be positive and show concern for their situation
- Make a special effort to resolve the issue
- Don't give up if things don't go right the first time