800-015-05-F: QI PROJECT ACTION PLAN FORM FOR PHONE ANSWERING AND ROUTING TEAM 9/29/2017

Action Steps / Tasks	Responsible Person(s)	Target Completion Date	Actual Completion Date
Update voicemail instructions Leave vacation message section to remove "dial 0 for operator" statement	Terri D	12/31/17	Not completed and abandoned (phone system will be changed by 1st qtr 2019 with new instructions)
Provide copy of external #'s list (resource list from Connie A) to all clerks	Connie A	10/6/17	10/4/17
Update internal routing list for people's responsibilities (start with EH/APC list and update for all divisions as necessary)	Connie A update her list for EH/APC; will provide to this group to decide what other info should be added.	10/6/17	10/4/17 Responsibilities added to website contact list 6/27/18
Develop cheat sheet for clerks on "best practices" (i.e. leave voicemail, cut off caller providing too much info, how to handle when they insist on talking to live person, giving out our last name, etc); Add this to and update the customer service policy	Jil to draft then send around to group Terri to update policy	10/6/17 11/30/17	10/11/17 included in customer service policy 7/18/18
Out of Office: Central location for out of office for more than 1 day at a time (for EH staff primarily); Jil wants a printout; this can be in Outlook (but Connie A's doesn't work). Will do it by paper.	Connie A and Jil worked this out; Connie A will ask IT to fix the calendars next week; Terri to setup the shared calendar.	10/6/17 (IT) 10/6/17 (paper system) 10/13/17 (terri)	Not completed and abandoned (paper system too cumbersome and new attendance system Kronos being implemented in 2018)

Action Steps / Tasks	Responsible Person(s)	Target Completion Date	Actual Completion Date
Update main phone line auto-attendant selections • Acquire a copy of current script to modify • Modify script to shorten/improve • Program phone system for revisions • Record and activate new script	Terri will acquire and modify then provide to this group for input. Then provide to DLT for approval. Once approved, IT will program the system and Jim Adams will record/activate.	10/6/17 (Terri acquire) 10/13/17 (Terri modify and provide to group) 10/31/17 (Terri provide to DLT) 11/30/17 (IT) 12/31/17 (Jim)	1/25/18 (acquire) 1/25/18 (provided to group) 5/25/18 (provided to DLT) 6/14/18 (IT) 6/14/18 (activated)
Update phone book so it doesn't say "public info" (there is a lot of calls received for general info, like when is light up DT, when is farmers market, etc)	Christi Allen	7/1/2018	Not complete prior to collecting improvement data since having difficulty finding who to contact – this will still be pursued.
Define policy on providing direct dial phone #'s on letters, emails, website, business cards (and what exceptions there are); add to website contact list for certain divisions. Decide per division	DLT decide policy and update customer service policy Christi Allen update website	5/1/2018 7/1/2018	Policy defined (included in Branding policy 7/18/18 and customer service policy 7/18/18) 6/27/2018
Setup auto-attendant for WIC to direct certain phone calls to correct place prior to getting to clerks. (develop script then have IT program phones, then record and activate)	Ashley develop script with input from WIC staff IT for programming Laura Roach for recording/activate	10/13/17 (script) 11/15/17 (IT) 12/15/17 (active)	10/13/17 (script) 12/22/17 (IT) 12/22/17 (active)

Action Steps / Tasks	Responsible Person(s)	Target Completion Date	Actual Completion Date
Setup auto-attendant for EH to direct certain phone calls to correct place prior to getting to clerk. (develop script then have IT program phones, then record and activate) Note: Improvement denied by EH Director, Mark Adams, on 10/1/17. Mark Adams retired in April 2018, and this improvement was decided to be implemented by interim EH Director, Jim Adams	Jim Adams with input from EH staff for script IT for programming Jim Adams for recording/activate	5/1/18 (script) 6/1/18 (IT) 7/1/2018 (active)	6/18/18 (script) 6/27/18 (IT) 6/27/18 (active)
Update phone button labels on clerk phones (that are outdated); some buttons are not used and need replaced with others	Each clerk to develop list of changes needed to their phones	10/6/17	Not completed and abandoned (clerks with outdated buttons decided this was not a priority)
Research having only one phone # for the HD (instead of each division having a #). Discuss with IT the capabilities. Note: Plans are in place as of 5/25/2018 to update City phone system with VoIP system in 1st quarter 2019. This change can be implemented at that time.	Jim Adams	Discuss by 11/30/17 Implement when VoIP system is being implemented, about 1st quarter 2019.	Discussed 3/7/18 at DLT meeting Website contacts update on 6/27/18 included only one HD main number for each division