

ZONING PRACTICE

JULY 2015

AMERICAN PLANNING ASSOCIATION



➔ ISSUE NUMBER 7

PRACTICE CUSTOMER SERVICE



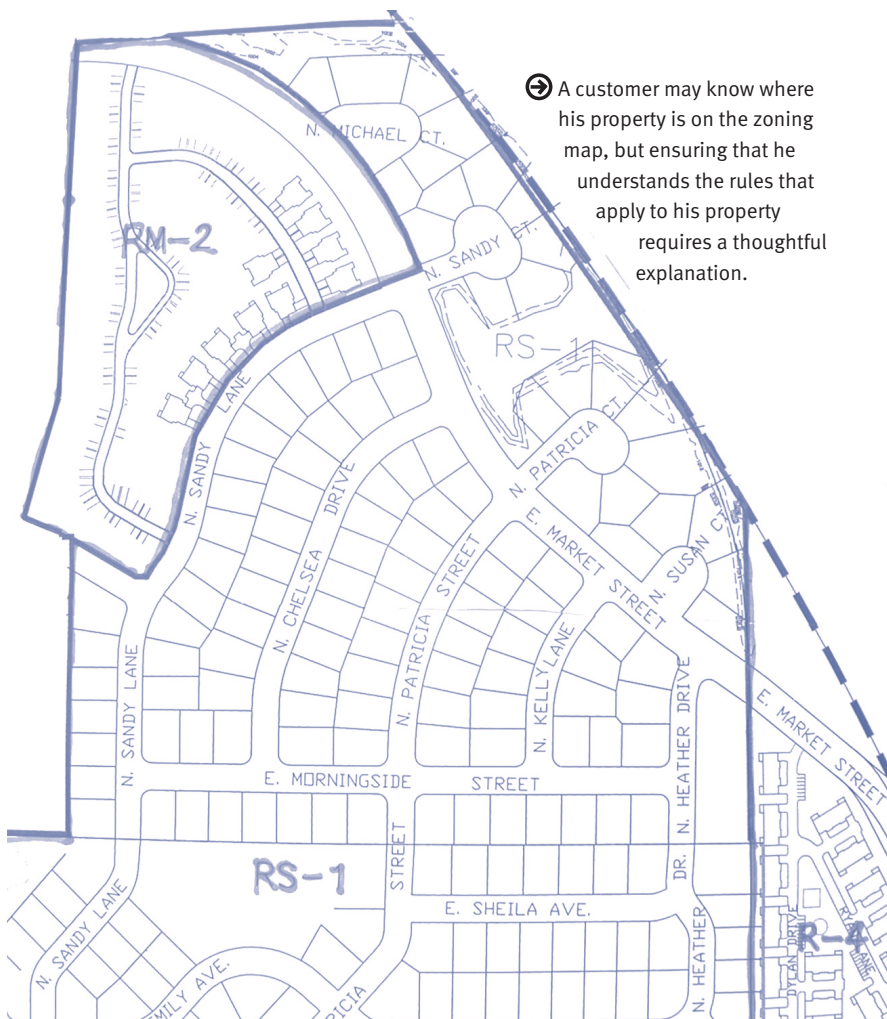
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Effective Zoning Counter Customer Service

By Michael Blue, FAICP, and Graham Billingsley, FAICP

Customer service expectations for the zoning counter are rather straightforward.

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➡ A customer may know where his property is on the zoning map, but ensuring that he understands the rules that apply to his property requires a thoughtful explanation.

the customer *no*, hand them a zoning variance application, and inform them that the process will take six to eight months.

Now imagine the couple at the counter who have saved to put that beautiful addition on their home. The planner tells them that they can't do it because it is two and half feet into the required rear-yard setback for the R-3 District. If they were in the R-2 District, they would be fine, but they're not. Also, by the way, the 250-square-foot addition (which they think is too small but is all they can really afford) is too big and puts them 78 feet over the allowed FAR.

Even if they understand what the planner was saying, all they heard was *no*. So what is the planner to do? How can staff find the time and patience to do more than absorb the customer's wrath, put on a fake smile, and try to send people to another department?

While it is true that zoning regulations carry the weight of law, this does not negate the idea that residents, property owners, and business persons are looking for and deserve high-quality customer service. In most localities, zoning regulations are not self-explanatory. This requires staff to spend time with customers, which can increase the challenges (and stress) faced by departments whose staffs have been reduced. Now that customer service must be seen from an economic development perspective as necessary to establish a customer- and business-friendly reputation, how are communities to address this concern? As the example above shows, the department store version of customer service is only a start, but it does not provide the whole answer.

The first step is defining the local standard for customer service. Each community is unique. Residents and builders have different expectations, and local development and building rules vary (sometimes widely)

The standard typically is set at the same level as a customer visiting a department store. Staff is expected to listen, be patient, be empathetic, and *know that the customer is always right*.

Wait a minute, what was that last one? "The customer is always right?" Not at the

zoning counter. If the zoning code says that permitted floor area ratio (FAR) is 0.45 but the customer *wants* it to be 0.55, they're not right. They can't be. For them to be right the zoning code would have to be changed. So the common response at the zoning counter is to tell

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About the Authors

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from place to place. Understanding local expectations is essential since missing the mark means getting a reputation as one of those towns that is hard to work in, possibly discouraging desirable development. Many communities have prepared a brochure or flowchart to explain the process. Unfortunately, sometimes the process is just too complex to explain that way. However, it is possible to overdo customer support; it may be a poor use of staff time and other resources to assist in every detail of every process. The bottom line? Before setting up a process to create good customer service, you need to know where you are going.

Once the target has been set, the second step is good staff training. Quality customer service at the zoning counter goes beyond the basics of patience and politeness; it requires a staff that is well trained and has a solid understanding of both the regulations that are being applied and the people on the other side of the counter. Insight and knowledge require more than a one-time, full-day seminar; what's needed is buy-in on the part of staff and support from managers, administrators, and elected officials.

There is no silver bullet to create great customer service at the zoning counter. Accomplishing that goal takes time, perseverance, and a good working relationship among staff. This article sets out an approach to getting there through understanding what customer service means in your organization, defining new expectations, providing staff members the tools and training to meet those

expectations, and sharing some dos and don'ts as a place to start.

DEFINING YOUR CUSTOMER SERVICE STANDARD

There are a few essential elements to understanding what your community's level of customer service should be. They will help you define service expectations, current customer service deficiencies, and the barriers to success. Just like starting a comprehensive plan, you have to know where you stand in

order to best plan out the path to success. It is important to understand what the customer service issues may be. The best way to get that understanding is through feedback from staff, collecting statistics, and conversations with customers. Buy-in from the administration and elected officials is also needed. Customer service has to be elevated in importance, consistently provided, and continuously reviewed and evaluated.

Review Existing Customer Service Policies

In all likelihood your community and your department have been through this before. Check to see if there is a set of policies or a past attempt to redefine customer service.

What you have now, or what you find as past practice, will be a good starting point. It's not likely to be exactly what you end up with, but it will be a good starting point. It's like writing a memo from scratch. There is nothing more intimidating than the blank page. Finding this starting point will get you past the blank page.

Talk to Staff

No one in your department knows more about customers and customer service than the people doing it right now. A manager will generally see what happens at the counter, but understanding why it happens requires some further investigation. Work to truly understand staff members' challenges and what they find rewarding. They should be asked and invited to participate in the solution, and they certainly



➡ It's always important to keep in mind that for many zoning counter customers, zoning regulations are not self-explanatory.

know the details of the current situation. You may well find out from them that the biggest challenges are leftover procedures from another era or an antiquated computer tracking system. Some of procedures might have been easily resolved, but staff never brought up the issues because they didn't want to rock the boat—or just figured it wasn't worth bothering because nothing would ever change.

Collect Statistics

Do you know how many customers are at the counter every day? How many phone calls are answered? If you don't, you are missing a useful tool to understanding the magnitude of the customer service issue and helping to explain it to your local decision makers. Are 500 counter visits a month a lot? Well, if there are two people working the counter and there are an average of 20 work days in a month and the average counter visit takes 20 minutes, that turns into each of those two people spending four hours a day working the counter. Or, in budget terms, one FTE (full-time-equivalent person). Is that answer good? Bad? It depends on local budget constraints and customer service needs. But translating the question into clear personnel and budget terms will help you and others understand how to address the question.

Talk to Customers

Ask how you've been doing with customer service. This can be in the form of a survey, focus groups, cold calls, etc. But hearing what your customers think is essential. Most common is the focus group—inviting in builders, developers, architects, and engineers to hear about their experiences. Yes, there will be a lot of horror stories. And yes, there will be instances where a single fluke event caused a strong impression, but this is an important step. In addition, the effort establishes credibility for your customer service evaluations. After all, how can you do one without the actual customers? You may well find that most visitors to the zoning counter have a positive experience.

Involve Administrators and Elected Officials

In order to define the standard for local customer service expectations, you absolutely have to involve administrators and elected officials. The city administrator and local officials will certainly have gotten more than a few calls from unhappy customers (sadly, happy customers seldom call). Whether the

There are a few essential steps to understanding what your community's level of customer service should be.

- Review existing customer service policies.
- Talk to staff.
- Collect statistics.
- Talk to customers.
- Involve administrators and elected officials.
- Take the process seriously.
- Define a consistent approach.
- Don't settle.

complaints they receive are justified or not doesn't matter; you need to know what the complaints are in order to address both the real and perceived issues.

The other reason to involve local decision makers is so that they are more informed when they do receive calls. If they know that zoning counter staff are actively working to raise the bar on customer service, they are

better armed to respond to the call. They will be able to look past the emotion of the caller to help create an objective, constructive discussion.

Take the Process Seriously

Managers typically have more than enough going on without adding a customer service evaluation onto their to-do lists. However, the perspective brought to this effort by the manager will set the tone for staff participating in it and decision makers evaluating if it is successful. The attitude of the manager, good or bad, seeps into every staff member. Perhaps the best way (as a manager) to understand this effort is to know that you will be better arming staff to perform the most challenging and high-profile aspects of their job. Reducing the conflicts and confusion at the counter will reduce aggravation for the entire work group.

Define a Consistent Approach

Done well, zoning rules are applied in a firm, fair, and consistent manner. However, many customers don't understand that the code is law, thinking of it instead as a guideline to be negotiated. The person at the counter constantly has to deal with that perception. Without clear direction on how to respond, each person will develop his or her own system for



➡ Staff training is more than a meeting or one time seminar; it must be an ongoing process.

managing the people and the stress. Some of those will work well, but some will not. Staff should have a consistent approach for working with customers. The best way to reach consistent service is to reframe the position as one focused on education. All contact with the public should start with listening and then responding with a description of what is required and why. Too often there is an assumption that customers know and understand more than they do.

Don't Settle

If your approach (as a manager or staff person) is to accept that 90 percent of the customers accomplish their business just fine because you never hear about them; that five percent create some challenge, but are handled by a middle manager; that three percent inevitably end up at the director's desk anyway; and that only two percent call the manager or an elected official—stop and rethink. Those two percent create a huge amount of work for staff and can give the entire department a black eye. Change the goal to the last two percent being so happy that they send a thank you note to the city administrator. We all have aspirational goals in our comprehensive plans—why not apply them to customer service?

TRAINING STAFF

So now you have developed a sound understanding of the definition of customer service in your community, what is expected, how you match up to those expectations, and your strengths and weaknesses. The next step is to make sure staff have the tools to do their work at the highest level, which benefits both you and your customers.

The most important caveat of the implementation process outlined below is to understand that it is a never-ending process, not an event. This is not a training session; it is a customer service professional development plan for those at the counter and the entire department. The end result will be staff members that are well prepared to provide customer service and can do it with less stress and more success.

Support Understanding and Buy-In

Managers may spend hours urging staff to be customer friendly with little result, and occasionally end up disciplining them. We have not heard of a case where this approach creates positive customer service. There is value in

working with all staff to understand customer service issues and how this helps to make everyone part of the team. All staff members need to understand the big picture in which customer service occurs. It has economic development implications. The fiscal strength of the community can be negatively impacted if there is less development (and development fees). And, while this point is not to be made as a threat or to create fear, less development can lead to fewer positions in development-related departments. Ultimately, buy-in comes from ongoing communication between managers and staff, and all staff being a part of the process for improving operations related to customer service.

Understanding and being able to explain the context in which zoning rules are established and applied is perhaps the most important element of zoning customer service.

Make All Staff Members Experts

Responses like “because the code says” or “we’ve always done it that way” are unacceptable answers. To avoid such answers, staff must understand the “why” in the zoning code. They should be able to explain why it doesn’t allow pole signs or why it requires four cars per 1,000 square feet for parking.

Understanding and being able to explain the context in which zoning rules are established and applied is perhaps the most important element of zoning customer service. From the customer’s perspective, knowing that there is a reason they can’t just build the deck, whether they agree with that decision or not, is far more acceptable than a vague denial. The manner in which customers hear bad news is critical. Thoughtful explanations help keep them from feeling dismissed by the process,

the staff, and the community. Further, this approach can help them to reconsider their plans and develop an alternative that is in keeping with the code.

It is also important that staff members understand the operations of other divisions in the department and other development-related departments. A key aspect of positive customer service is the customer feeling that the person they are working with is knowledgeable about the topic, the process, and the organization. Someone who is not well versed in local operations will undermine that confidence as much as not knowing why a zoning standard exists. Staff members need not be experts in the work of other departments, but they should know what other groups do and whom they can call with questions. This knowledge is best developed with hands-on experience. For example, every planner should spend time in the field with a building inspector.

While the phrase is already a bit tired, “taking down silos” between work groups is essential to good customer service. Within the city’s staff there should not be “us” and “them”; everyone represents the same organization. Yes, this is challenging, and your organization may have to swim upstream against years of habit, but there are a number of ways to help make it happen.

First, establish regular interdepartmental meetings to review and discuss common development review items. People don’t like more meetings, but this one works well. It will especially improve the process if interdepartmental review currently consists of just passing along a memo or checking a box in the computer system.

Have new or entry-level staff attend meetings they might not otherwise be part of. Have staff from other departments or divisions give a presentation at internal staff meetings. Similarly, give presentations at staff meetings of other departments or divisions. Have other staff members in the department take a shift manning the zoning counter. Involve the entire staff on major projects such as code updates or specific area plans. Hold brown bag lunches with topical discussions about current as well as long-standing issues that will inform the staff on details and present possible approaches in addressing these issues as they arise. And find times to get staff together outside of work. We’ve seen intra- and interdepartmental softball and dodgeball games build team confidence and morale.

Know the Customer

The worst customer service outcome is when either party hangs up the phone and thinks, “what a jerk.” Don’t forget the importance of staff not feeling that way. Work with staff members to discuss and understand why they get the kind of reactions they do. More often than not, there is a reason the customer took out his frustration on the counter staff. Helping staff understand this will strengthen customer service skills and reduce job stress.

Why do people say the planner was “rude” to them on the phone? This one’s easy. Either the planner *was* rude, or more likely, the customer didn’t get the answer he wanted. If the customer calls an elected official to express this concern, saying the staff was rude will help his case get traction. If he can’t get the answer he wanted, this complaint keeps the customer from being dismissed at the next level (by the way, the same is true of “I never got a call back”). This is just human nature; not much can be done about it. The true secret to defeating these claims is to create a strong, well-respected customer service process.

Why do people tend believe their contractors or realtors and not staff? This one is a bit more complicated, but remember, they picked their contractors (or any number of other professionals). If the customer’s contractor says the zoning application was submitted six weeks ago

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- Set clear and reasonable expectations.
- Find solutions that meet the issues.
- Better inform the public.
- Hire and place the best person in the job.

and the city is sitting on it, why shouldn’t the customer believe him? And not to psychoanalyze the customer, but there would be a certain amount of shame in not supporting someone he picked. Again, this is just human nature; staff shouldn’t let it be a source of stress.

IMPLEMENTATION STEPS TO MAKE IT ALL HAPPEN

So far we have described the importance of understanding what exactly customer service means in your community and how to provide all staff with the tools to make it happen.

But that first step is always a big one. Where should you start? Here are a few ideas about how to help department staff implement good customer service.

Dos and Don’ts

The best way to develop customer service rules is to do so collectively as a staff and specifically address local issues. Below are some simple dos and don’ts. As a first step, get the department staff together and develop a list of your own.

Set Clear and Reasonable Expectations

Many offices have customer service rules: return phone calls, meet the dress code, don’t be tardy, etc. These are important but often unclear. Unclear (or unreasonable) expectations create uneven customer service. In one particular staff group the standard was that phone calls be returned within 24 hours. There was wide confusion as to whether that meant a call coming in at 1:00 p.m. on Wednesday had to be returned by 1:00 p.m. on Thursday, or just by the end of the next day. The difference was never clarified and there was confusion and stress when customers complained that a call was not “promptly” returned. Minor differences in expectations become points of contention. Be clear from the outset.



➡ Complex development projects require intensive customer service well beyond issuing the building permit. Questions, changes, and even mistakes may need to be addressed through building occupancy.

DO	DON'T
Use language everyone understands.	Speak in jargon.
Explain why the code limits building size.	Say you can't build an addition just because the code says so.
Tell the person on the phone you or someone else will get back to them in a specified amount of time, and do it.	Just transfer to the call to another department that may or may not have an answer.
Alert other staff when you are away from your desk.	Disappear for lunch without leaving word that you are gone.
Take charge of the question, telling the customer how you will get them the answer.	Blame others, even if it is the case (e.g., don't say another department is holding up an application).

Find Solutions That Meet the Issues

Target the issues identified in evaluating your customer service and work with staff to identify specific solutions. For example, a common approach taken by departments to improve customer service is to assign a single point of contact for an applicant. If among the issues identified in the customer service evaluation is that applicants didn't know which staff member to call or felt "passed off" to other staff, this might be an approach to take.

Better Inform the Public

The more an applicant knows about the development regulations that apply to them and the process they may be required to undertake (even before contacting the department), the better will be their customer service experience. An informed customer will also reduce the amount of time required to successfully meet their request and create a more positive experience for staff. Some best practices for customer education include the following:

- Make sure that brochures explaining the zoning process do more than just repeat what is in the code. They should be in plain English, graphically attractive, and tell the basics (not every detail) of a requirement.

- Use your website as the primary tool for sharing information with the public (don't worry, those brochures can go on the website). Just be sure that your website is not a treasure hunt for applicants. Make the development and zoning items clear; better yet, devote an easy-to-find section on the website to building and development so all the information is in one place.

- Create an informed customer by copying property owners on correspondence to their design professional, contractor, or representative.

Prepare a video on the process that can be accessed from the website. People learn everything from car repair to making cupcakes from Internet videos—why not how to prepare a zoning application?

Too often the counter is considered a great place to learn—and a junior planner gets the job.

Hire and Place the Best Person in the Job

Too often the counter is considered a great place to learn—and a junior planner gets the job. Can you afford the mistakes that you expect an entry-level planner to make? Probably not. The best planners for the position are those with some experience. Have those be the ones a less experienced person learns from. And when hiring those new staff members, make sure prospects can work with people. Putting an introvert in a position that requires constant public contact will only create problems.

IN CONCLUSION

The bottom line is that your customer service is fine until it's not. Just because it hasn't been "that big" of a problem yet or you feel you don't have time to deal with it doesn't mean it can go on as it has. Customer service requires ongoing work to make sure it reflects the changing expectations of communities and customers. In this way the process is more than just trying to tackle any nascent "bad habits" of your work group. And don't forget, momentarily bad cus-

tomers service haunts the department for days, if not months and years. People tend to tell the horror stories forever.

Every community is different, and the best answers reflect local needs and practices. Well-applied, sound customer service makes the experience better for both sides of the counter.

Cover: BakiBG/iStock/Thinkstock;
design concept by Lisa Barton.

VOL. 32, NO. 7

Zoning Practice is a monthly publication of the American Planning Association. Subscriptions are available for \$95 (U.S.) and \$120 (foreign). James M. Drinan, ID, Executive Director; David Rouse, AICP, Managing Director of Research and Advisory Services.

Zoning Practice (ISSN 1548-0135) is produced at APA. Jim Schwab, AICP, and David Morley, AICP, Editors; Julie Von Bergen, Assistant Editor; Lisa Barton, Design and Production.

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