

Contact Center Center of Excellence HUD Phase I Artifacts

U.S. Department of Housing and Urban Development
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Contact Center Center of Excellence (CoE) Overview

The Contact Center CoE's goal for Phase I is to evaluate HUD's current contact center landscape and apply best practices research to develop tailored recommendations for enterprise-wide optimization.

Mission

*Our mission is to support **enterprise-wide contact center transformation** at HUD to improve **citizen experience** and **operational efficiency**. Through recommendations on best practices, emerging technologies, and contact center shared services, we aim to revitalize the role of HUD's contact centers in ensuring access to affordable housing while maximizing the impact of taxpayer dollars.*

Engagement with HUD

*Close collaboration with HUD stakeholders is integral for **collecting contact center data, identifying and prioritizing opportunities for improvement, and developing and promoting a shared future state vision**. In particular, the Contact Center CoE engages HUD CXO teams, program office leadership, contact center operators, and agents.*

Approach

1

Analyze HUD Current State

Undertake a rigorous assessment of HUD's contact center operations, customer experience, and common pain points, leveraging HUD personnel and relevant artifacts

2

Identify and Apply Best Practices

Research to inform future state vision that incorporates best-in-class components from government and the private sector

3

Develop Tailored Recommendations

Apply research and analysis to develop HUD-focused recommendations for enterprise-wide contact center transformation

Goals

Improve customer experience

- Provide HUD customers with timely, accurate, and consistent information across channels
- Identify program opportunities and improve data-driven decision making by capturing customer insights
- Enable program office employees to focus attention on providing high-value service for complex inquiries

Maximize HUD's efficiency

- Leverage emerging technologies and a knowledge management database to handle basic inquiries
- Generate cost savings by shifting general inquiries to lower-cost channels
- Identify opportunities to leverage common contact center tools across HUD
- Apply best practices in all HUD contact centers through standardized processes, systems, and measurements



Current State Assessment Methodology

The Contact Center CoE used a robust and diverse array of research inputs to analyze the current state of contact centers at HUD across three components: inventory and cost, maturity, and customer experience.

Current State Research Conducted at HUD

- Collected **operational data** (e.g., contact volume) from 6 formal contact centers¹
- Conducted **survey** on contact center capabilities with 5 formal contact centers²
- Conducted **70 “Mystery Shopping” calls to 41 contact lines** to assess contact center customer experience
- Visited **3 Field Offices** (District of Columbia, Baltimore, Philadelphia), **2 contact centers** (REAC TAC, Philadelphia HOC), and **1 program site** (SOME Conway Center)
- Discussed contact center and customer experience challenges and opportunities with **20+ HUD senior stakeholders** (e.g., DAS PIH, Field Office Directors)
- Interviewed **8 contact center operators and agents**
- Demoed **2 CRM platforms** (Salesforce, Microsoft Dynamics) and **1 beta intake tool** (Leapfrog)
- Reviewed relevant **artifacts provided by HUD** (e.g., 2016 Franklin Maxwell study)

Analytical Components of Current State Assessment

Inventory and Cost

- Identification of all HUD contact centers
- ROM estimate of current contact center spending and analysis of major cost drivers
- Qualitative analysis of intangible costs (i.e., productivity losses, service failures, risks)

Maturity

- Assessment of HUD contact centers’ maturity on nine operational and infrastructure components (i.e., CRM, Telephony, Hosting, Network, Workforce, Knowledge/ Content Management, Quality Management, Training, SOPs, Reporting)
- People, process, technology analysis of FS&D maturity

Customer Experience

- Analysis of HUD’s current state customer experience, including process efficiency, CSR helpfulness, and technology
- Assessment of information accuracy and consistency across various phone lines

¹ Multifamily Housing Clearinghouse data was not available

² Single Family Housing National Servicing Center and Multifamily Housing Clearinghouse were unable to participate in the survey



Contact Center Inventory

HUD currently engages with customers through a patchwork of phone channels, including seven formal external-facing contact centers, 65 field offices, and numerous other phone numbers, few of which share meaningful common CRM, knowledge management, or telephony systems.

Program	Formal Contact Center	Field Office	Shadow Contact Center*	Other Potentially External-facing Contact Center
CPD		<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> Community Connections / Federal Surplus Property Program CPD Rural Gateway 	<ul style="list-style-type: none"> ‡ TDD/TTY for Community Improvement Clearinghouse ‡ Brownfields Hotline / CPD Clearinghouse ‡ Disaster Voucher Program
FHA / Housing	<ul style="list-style-type: none"> FHA Resource Center Multifamily End User Support Services (<i>closed February 2019</i>) Multifamily Housing Clearinghouse SFH National Servicing Center (<i>migrating to FHA Resource Center</i>) 	<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> Financial Operations Center Manufactured Housing Info SFH National Servicing Center Hotline / Secretary Held Notes HUD Refunds Support Service Center Fort Worth Multifamily Online Property Integrated Information Suite Housing Counseling Line 	<ul style="list-style-type: none"> † Fort Worth Multifamily Property Investigation Division † Oklahoma City National Servicing Center (separate phone number from SFH National Servicing Center) ‡ Title I Program ‡ Asset Management Helpline ‡ FHA Mortgage Refund Call Center
PIH	<ul style="list-style-type: none"> REAC TAC PIH Information Resource Center 	<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> Native American Programs ONAP / Codetalk 	<ul style="list-style-type: none"> † Fort Worth PIH ‡ PIH HQ Financial Management Center ‡ Rental Rehabilitation Program
FHEO		<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> Fair Housing Best Practices Task Force Housing Discrimination Hotline (& TDD) HUD office of FHEO San Francisco Philadelphia Fair Housing Hotline Atlanta Housing Complaints Boston Housing Complaints Chicago Discrimination Complaints Denver Housing Complaints Fort Worth Housing Complaints Kansas City Housing Discrimination Hotline New York City Housing Complaints Seattle Housing Complaints 	
PDR		<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> HUD User (& TTY) 	
Ginnie Mae		<ul style="list-style-type: none"> 65 Field Offices 		
LHCHH		<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> Individual Staff Phone Numbers by Region 	
Other (e.g., OCIO, OCHCO, Temporary Programs, Admin, FPM)	<ul style="list-style-type: none"> HITS National Help Desk 	<ul style="list-style-type: none"> 65 Field Offices 	<ul style="list-style-type: none"> HUD HQ Electronic Grants Mgmt. System HUD Distribution Center (& TDD) 	<ul style="list-style-type: none"> † Disability Rights † Fort Worth Directory Service † Los Angeles HUB

LEGEND:

† Not published or searchable, but still in service (in some cases routes to different number or leads to VM)

‡ Published, not in service or not a HUD number

NOTES:

*Shadow contact center numbers may route to small contact centers or to individual employee lines

Key Recommendations

HUD can improve contact center efficiency, effectiveness, and customer experience by establishing a single, front-door contact center, implementing BIC technologies enterprise-wide, leveraging contact center analytics, and supporting CSRs with knowledge management and training.

- 1 Establishing a single, centralized contact center with a clear governance structure would drive cost and service benefits by standardizing a single vision, procedural framework, technical systems foundation, and data analysis methodology across HUD**
 - Creating a clear HUD entry-point, supplemented by a directory of services, can minimize the number of misdirected calls that result from customer misunderstanding of issues and/or of HUD's program offerings and services
 - Developing enterprise-wide standard operating procedures (SOPs) would reduce process inefficiencies and drive a consistent customer experience
- 2 Implementing best-in-class technical systems across HUD could improve internal and external communication and enterprise-wide technical capabilities/operations**
 - Investing in contact center technologies such as CRM tools, knowledge management databases, advanced telephony systems, IVR, and AI chatbots can generate savings by shifting calls to less expensive tiers and reducing cumbersome processes
 - Enterprise-wide contracts for technical systems would reduce duplicative costs and processes, and help standardize customer experience
- 3 Contact center analytics that identify and report on emerging trends can enable contact centers to act as a business driver for HUD by identifying issues early and facilitating a proactive approach**
 - As a primary site of customer interaction, contact centers present an opportunity to identify recurrent challenges and develop targeted solutions
 - Analysis of integrated HUD data may allow identification of and solutions to multiple issues spanning different program areas across HUD
- 4 Implementing enterprise-wide knowledge management and training HUD CSRs on all basic program information can strengthen contact center efficiency and effectiveness**
 - Empowering all CSRs to answer Tier 1 inquiries for each program area would improve productivity by reducing the need to escalate basic inquiries, and support positive CSR attitudes by equipping CSRs with the necessary tools and information to be helpful
 - Reducing escalations would lessen inquiry escalations and subsequent time spent by program employees on customer inquiries, which would enable these employees to refocus their attention on "high-value" work

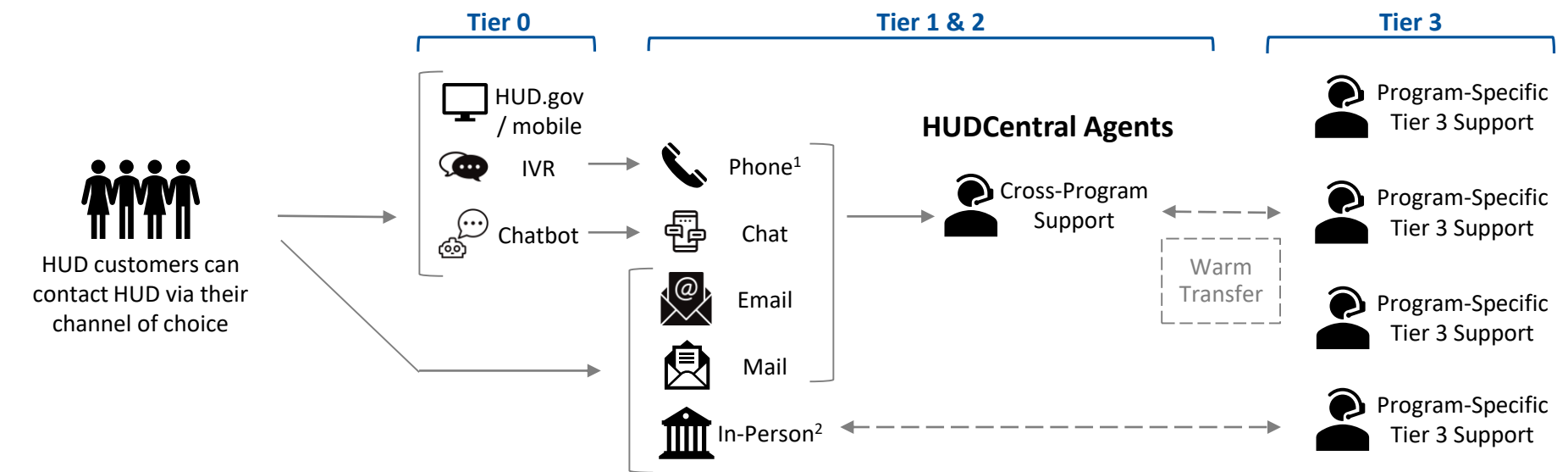
Future State Vision

HUD's future state contact center vision encompasses standing up HUDCentral, which will drive operational and cost efficiency and effectiveness while improving internal data sharing and analysis, and support excellent customer service delivery across all channels.

Vision Statement

Establish **HUDCentral**, a mature, **enterprise-wide front-door contact center** with an ecosystem of supporting infrastructure, technology, and organizational management that provides internal and external customers with timely, accurate, and consistent services.

HUDCentral: Future State Customer Journey



HUDCentral: Integrated Technology

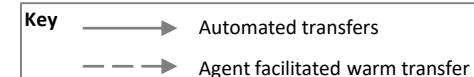
Knowledge Management	CRM	VoIP Telephony (IVR/ACD)	Content Management	Consolidated Desktop	Case Management	Tech. Pilots (e.g., AI Chatbot)	Operational Analytics
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HUDCentral Benefits

- Consolidated, integrated communications channels enable HUD customers to get timely, accurate and consistent answers to their questions anytime, anywhere on any device
- Over time, improves efficiency by shifting general inquiries and information to lower-cost channels
- Increases self-service options and enhances accuracy of the information provided to customers
- Reduces contact center costs
- Establishes consistent customer experience across the agency through the implementation of standardized operating procedures and KPIs
- Enables HUD to measure satisfaction levels to enable continual improvement

¹To facilitate customer transition to a single 1-800 number, all existing tier 1 HUD contact lines should re-route to 1-800-CALL-HUD; includes calls to all field offices

²Refers to in-person field office visits



Vision Enablers

To achieve the vision of a mature, enterprise-wide contact center that provides excellent customer experience, HUD will require a holistic focus on developing or obtaining five core enabling capabilities spanning people, process, and technology.

