

The How to Guide for

# Delivering Omnichannel Citizen Self-Service



Fifty years ago, when people wanted to request services from their local government, they usually had to go down to city hall, stand in line, and fill out a form or file the correct paperwork. Or, in some cases, call a direct line. 25 years ago, cities began to make things easier by transitioning to a 311 number that allowed citizens to access government services from a single phone number.

Today? It looks a little different.

The modern citizen is a digital native, looking for Amazon-like efficiency and experiences in every aspect of their lives, including their interactions with city officials.

*“Nearly three fourths (73%) said increased digital services gives the impression that government is forward thinking, while 72% said expanded digital services would both increase their overall satisfaction with government and increase their willingness to engage.”*

*- Accenture*



Self-service solutions have been a prominent feature in service-led industries for years, but as citizens have begun to view their interactions with local government in the same light as interactions with their favorite streaming service, they’ve begun to demand a similar level of ease and convenience.

And the same can be said for a city’s businesses, as they look to streamline their processes and efficiently engage with their local government for such things as permit registration and fee payment.

What does that mean for you? The onus has been placed on local government to provide the kind of self-service solutions that resonate with their citizens and local businesses alike, making it easy for them to get the information and services they care about, when they want them, and through whichever channel is most convenient.

And that means providing omnichannel self-service solutions.

# What is Omnichannel Self-Service?

Understanding omnichannel self-service requires you to have a crystal-clear understanding of a few different terms.

Let's start from the top: The method by which you interact with the public, and they interact with you, is known as a channel. In today's digital world, many organizations choose to use a multitude of channels to reach their audience.

When you use multiple channels to communicate and engage with people, while ensuring they have a seamless experience when going from one channel to the next, it's referred to as omnichannel.

Omnichannel citizen self-service, then, is empowering the public to request services and manage those requests through a variety of channels with a seamless, personalized experience across those channels. For example, a citizen could report an issue via phone and check on the status of that issue by logging into the city's web portal. Or a business could apply for a permit online and get updated via notifications on their smartphone.

*"A true omnichannel experience threads the customer profile and history across the channel landscape."*

*- Microsoft Global State of Customer Service Report 2020*

## The Benefits of Self-Service

To be sure, there is both an economic and natural threshold which a city must meet in order for omnichannel self-service solutions to make sense. For instance, a small, rural community serving 500 citizens may not need the full spectrum of self-service channels, instead, they would do better with focusing on one or two channels that best serve them.

## Types of Channels

- In-person
- Phone
- Mobile App
- SMS
- Email
- Website/Web Portal
- Chatbot
- Virtual Assistant
- Social Media



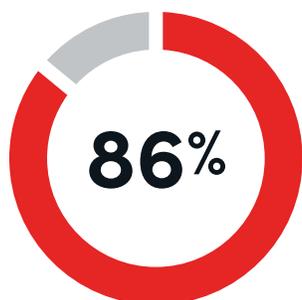
Whatever the case may be, the benefits of such self-service solutions go well beyond happier citizens.

#### **For the Public (citizens, businesses, and visitors)**

- Ability to perform tasks or submit transactions any time, from any location
- Improved overall experience
- More transparency and insight into the various processes
- Improved awareness regarding specific government services
- Ease of use

#### **For the City**

- Elevated engagement levels
- More efficient processes
- Improved trust between the citizen and the city
- Time and resources able to be focused on bigger projects
- Increased accountability



**of respondents expect a self-service option and two-thirds try self-service first before contacting a live agent.**

*– Microsoft Customer Service Report*

# Delivering on the Omnichannel Self-Service Promise

Delivering on the promise of omnichannel self-service is easier said than done. To truly live up to your citizens' and local businesses' expectations, governments must commit specific time and resources to the process – and be willing to continue that transformation into the future.

Simply put, citizens crave the convenience and ease of self-service solutions. Something which can only be accomplished when a government agency delivers self-service capabilities through an omnichannel methodology, ensuring everyone is able to access the solutions they seek via the channel most convenient for them at any given time.

So, ready to start delivering?

These dos and don'ts will get you started and keep you on the right path as you deliver on your omnichannel self-service promise.

## ✓ Do Have the Right Mix of Channels

When it comes down to it, omnichannel self-service hinges on having the right mix of channels. While a vast array of channels exists, not every channel is used by every citizen. It's your responsibility to understand your community's preferences and deliver self-service solutions appropriately.

Knowing where your citizens are willing to engage is the first step to building something truly engaging.

*98% of Americans switch between devices in the same day.*

*- [Google Research](#)*





- **Mobile App:** Think of your mobile app as an on-the-go version of your portal, containing everything your citizens need to engage with you. Note, it is unlikely that a citizen will download an app for one-time use. If you want citizens to really engage with your app, you are going to need to engage with it as well, updating functionality and continuously reporting on current happenings.



- **Online Portal:** Your portal should be the go-to place for citizens and businesses alike to make payments, download forms, and submit requests. Making those previously mundane (and manual) tasks a little more efficient by adding in automation.



- **Chatbot:** Chances are, many of your departments get the same 10-15 questions almost daily. Why not include a chatbot to answer these FAQs? This saves time for the government official and eases friction for the citizen. Win, win.



- **Telephone/Interactive Voice Response (IVR):** Many of the requests your citizens are calling about can be solved without the help of an actual official. Including IVR allows citizens to make payments and access critical information without bogging down an employee.



- **Virtual Assistants:** Amazon's Alexa or Apple's Siri can do more than just tell you the weather. Virtual Assistants allow citizens to easily access your portal and associated services with a few simple voice commands.



- **Email:** From critical notifications to follow-ups and regular updates, email allows your citizens and local businesses to stay informed and engaged.



- **SMS:** Text messaging between people and organizations is on the rise and can serve as a convenient alternative to emails or phone calls for citizens and businesses that prefer it.



- **Push Notifications:** Don't let critical updates get lost in the mail. Real-time notifications keep citizens informed and aware.

Keep in mind, this is by no means a complete list of channels. And every city will need to decide for themselves what channels make the most sense for their solutions and their citizens.



**Bonus: Search functionality is essential to the ease and accessibility of many channels. Without it, end-users will be left digging through countless posts and updates to find the information they need.**

## ⊗ Don't Leave Anyone Behind

It's all too easy to get caught up in the latest and greatest technology and innovation, launching new platforms and mobile apps to better serve your community as a whole.

But what about the citizens that aren't able to use certain channels? Three key issues to keep in mind are:



- **The Digital Divide:** A term referring to those who don't have access to or the means to acquire the necessary technology.

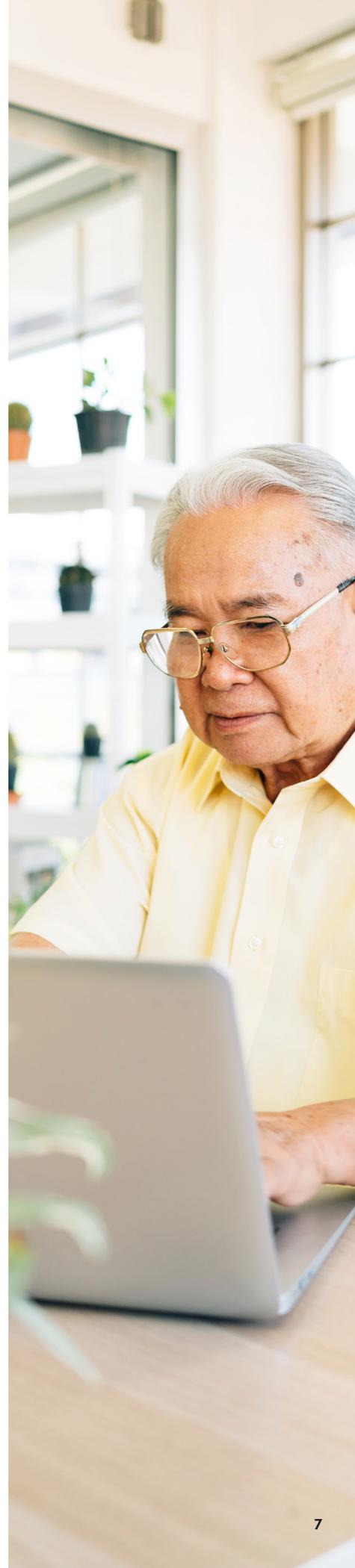


- **Accessibility:** Care should be taken to ensure your channels are as accessible as possible for people with disabilities. But even when this is done well, keep in mind that some channels may be difficult for some people to use, so keeping alternative options available is always a good idea.



- **Languages:** Multilingual support across channels will help to ensure that everyone in your community can get the same level of service.

While offering these omnichannel self-service solutions will afford the majority of your citizens a better experience and improved engagement level, it's critical to remember that some of the citizens most in need of your services may not have access to a computer or may not be able to use your self-service solutions due to a lack of accessibility. Providing a true citizen-focused solution, means allowing citizens to self-serve as needed or desired (and providing them with the means to do so), while simultaneously offering support for those citizens who can't self-serve or simply don't want to.





## Do Include a Knowledge Base

Simple fact: people are going to have questions. And more than likely they will go looking for the answer before dialing your phone number. This makes a knowledge base a critical component of any successful omnichannel self-service initiative.

### Step 1: Determine What Should Be in Your Knowledge Base

Think about the types of questions you've received from the public in the past and what new questions may pop up as you roll out more self-service capabilities. Let those questions guide your initial knowledge base content, then continue to build on it with more helpful information.

A high-quality knowledge base will often include:

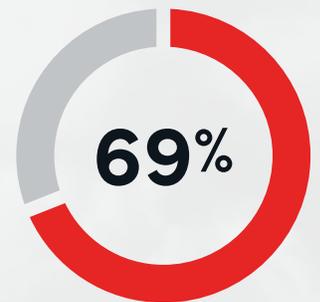
- FAQs
- Instructions/How-Tos
- Critical Updates
- Important Citizen Updates
- Relevant Business Information
- General Hub for Sharing Material

### Step 2: Determine Where Your Knowledge Base Should be Located

Almost as important as the what, the where of your knowledge base can be the difference between a great self-service experience and a lackluster one. After all, if citizens can't find the information, it doesn't really matter how good it is.

Your knowledge base should be integrated with the self-service function to improve both the user experience and issue resolution in one interaction. By tying specific knowledge or information to a relevant transaction, you can provide a more seamless experience.

Picture this: A citizen searches for a "street light issue" and several articles come up. No matter what article they select (street light outage, street light pole graffiti, etc.) there should be a call to action or button to request that service. Instead of having to search the website, the citizen is provided with the associated action instantaneously. That's the level of experience you should strive to create across your knowledge base and other self-service solutions.



**of consumers first try to resolve their issue on their own, but less than one-third of organizations offer self-service options such as a knowledge base.**

- Zendesk

## ❌ Don't Confuse Self-Service with Complete Autonomy

While critically important to the success of your omnichannel self-service solution, a knowledge base is not the end-all-be-all. And it shouldn't be treated as such.

Maybe it's missing the answer to a critical question, or maybe a citizen would rather get a more thorough answer from an actual official. Whatever the case may be, your knowledge base is just one resource for your citizens and will never take the place of your live employees.

Bonus! Your Knowledge Base can be a resource for your city as well, providing the capabilities to:

- Train new employees
- Look up specific services
- Initiate actions on behalf of the citizens or stakeholders

## ✅ Do Follow Best-Practices from Outside Experts

While the government may have many unique nuances when it comes to citizen self-service, it's important to learn from the best. And in this case, that means looking outside of your industry to learn from the masters of omnichannel self-service.

### Amazon

What's one word you never hear associated with Amazon? Friction. Why? Because they have created a self-service solution that removes points of friction to create a seamless experience across channels (web, mobile, virtual assistants, social media, and more).

**The takeaway?** Different channels make sense in different contexts – if you are out and about then mobile would make the most sense, if you are home or in front of a computer then web would be the obvious choice. By allowing customers to use the channel that makes the most sense for them at any time or location, Amazon has eliminated friction in their customer experience. Customers can easily interact (or buy from) them more often and are more satisfied when they do.



## Netflix

The master of personalization, Netflix is the leader in using customer data to serve up relevant offerings.

**The takeaway?** Citizens expect any communication or self-service solution to be personalized to their needs. They don't want to repeat their address or personal information every time they visit your site. Using their data, your omnichannel self-service solutions should offer personalized experiences relevant to the individual.

## Apple

Apple is the leader in technology because they continue to *lead* with their technology, releasing new innovations that customers didn't even know they wanted, but now couldn't live without.

**The takeaway?** Innovation doesn't stop. Your solutions need to keep pace with your citizens which means a continued transformation effort.

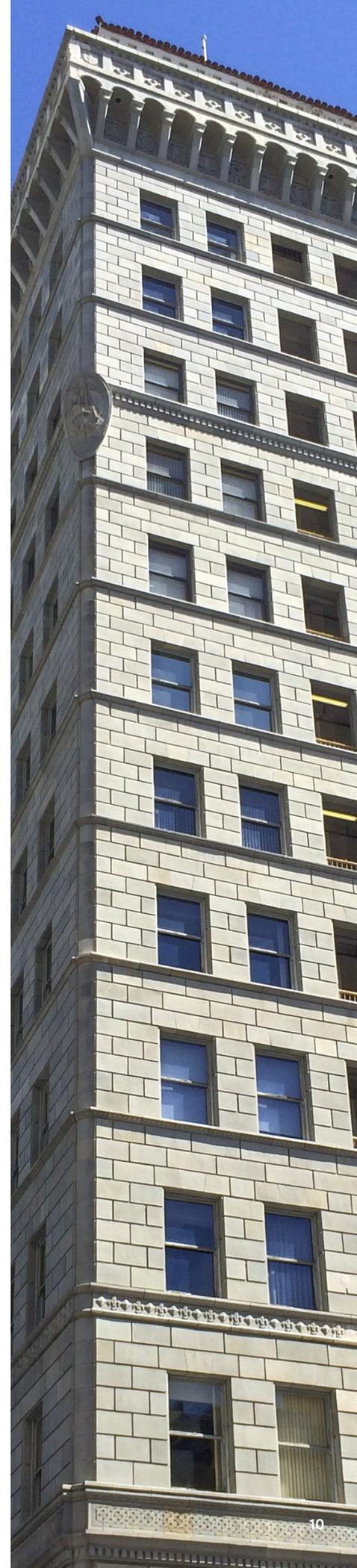
## ⊗ Don't Ignore Lessons from Other Cities

You aren't the first city to look towards omnichannel self-service and you won't be the last. Having worked with a range of cities across the country as they launch their own initiatives, we've been able to see what works and what doesn't – and give you the key insights to walk away with.

## City A

City A launched a brand-new mobile app expecting to provide a self-service solution and drive efficiency. Unfortunately, the city did not take into account that the majority of their citizens were retired service members who simply weren't interested in downloading a mobile app.

**The Lesson:** Know your citizens and research the channels they actively use before investing.



## City B

City B was hesitant to include a web-based portal in their self-service solution set, not realizing that for longer format forms or applications (requiring document attachments, etc.) a browser was actually the optimal channel.

**The Lesson:** Every channel serves a different functionality – integrating omnichannel delivery of self-service solutions allows your city to serve the entire spectrum of citizen needs in the easiest and most convenient way possible.

## City C

City C had successfully launched a mobile app and was looking to increase awareness and use of the app. Instead of spending thousands in advertising, they took a different approach: adding a promotion for the app to the bottom of every email and asking that all local officials mention the app while out making their previously planned speeches. The results? Downloads and usage peaked.

**The Lesson:** Use the channels at your disposal to inform your citizens of the self-service solutions you offer. Cross-channel promotion is extremely effective. And by motivating or incentivizing city staff that use certain channels to spread the word about them, you can create a viral effect that will lead to faster and greater adoption.



## Do Support Your Initiative with the Right Technology Stack

Words like digital transformation and modernization sound intimidating, but an easy place to start is with an audit. What technology do you have now? What are your transformation goals and does your current technology serve those goals?

Building out an understanding of your current capabilities sets you on the right path for the next steps. And the first step you'll probably be taking after your audit? Finding the right supporting technology to enable your omnichannel self-service solution. Because after all, frictionless self-service isn't a reality without omnichannel capabilities and those capabilities aren't possible without the technology to support them.



Considerations when looking for the right technology fit:

- How flexible is the solution?
- Is the solution able to grow and transform with you or is it only a solution for today's problems?
- How difficult is it to add in new services or additional features?
- What level of security and compliance does this technology offer?
- What is the total cost of ownership?
- How easy is the process of data migration?
- How well does it work with existing systems in the city?
- How easy is it for the city staff to learn and use effectively?
- Does it provide data/report/metrics to monitor and evaluate improvements in services?

## ⊗ Don't Just Find a Software Vendor, Find a Partner

So what makes a good software vendor? That answer will depend on your specific needs and goals. However, every vendor or partner should bring deliverables to the table that ensure you are able to exceed citizen expectations and drive continued engagement.

### Must-Have Qualities

**Security and Compliance** – As a government agency you are dealing with personal information every day. Your technology partner must live up to the standard that you set for yourself in citizen service and protection.

**Technical Capability** – Does your vendor provide the technical support and capabilities to meet your goals, or will you be stuck with a solution that only serves half your needs and requires multiple other software integrations?

**Expertise in the Industry** – The public sector is a nuanced industry with extremely specific needs and considerations. Any good 3rd party partner should be able to speak to those needs and highlight their history of success.

**Ongoing Support** – What type of ongoing support does the vendor provide? What does the support include? What does the support cost? You'll want to ensure your technology is well-supported and easy to maintain.

### Nice-to-Have Qualities

**Continued Transformation** – As your citizens continue to transform, so too should your solution. As a true partner, your 3rd party technology provider should be up to date on the latest technology trends and proactively integrate new solutions citizens expect from their governments.

**Resilience** – What happens if your mobile app crashes? Does your 3rd party partner offer the support to keep you running efficiently while fixing the issues on the back end? Short answer: they should.

**Cost Control** – Arguably this could go in the must-haves depending on budget and flexibility, but the cost can play a deciding factor when it comes to selecting your 3rd party partner. More specifically, looking at how your partner charges for their services can be the difference between a solution looking good on paper and costing you double your budget.

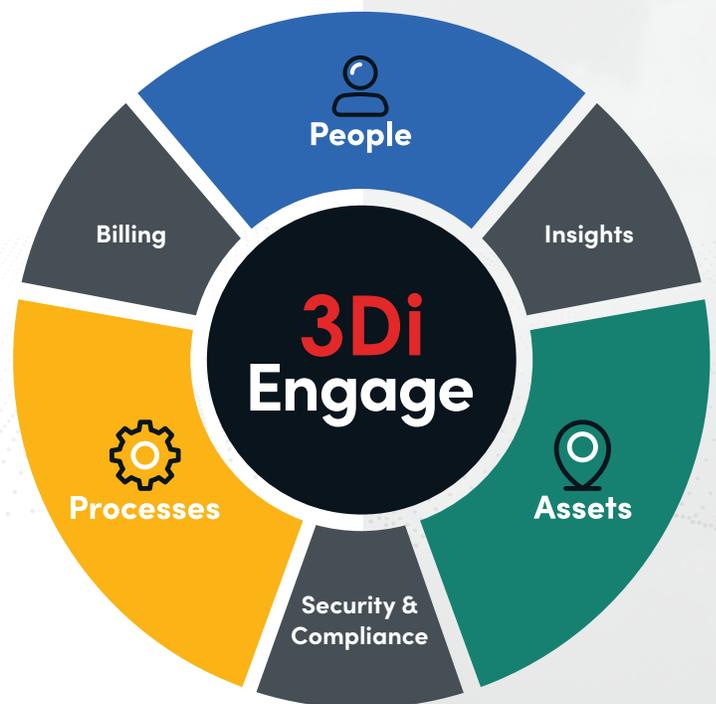
## 3Di as a Case Study

We've worked in the citizen engagement space for the past decade and have used that experience to create a comprehensive software platform for local governments: 3Di Engage. The platform was designed to:

- Holistically meet the needs of your citizens and local businesses with self-service solutions that range from reporting a pothole to requesting a permit for a home improvement project to submitting payment for a fee/fine.
- Eliminate silos between departments and systems with a robust platform approach that provides a single solution for the vast majority of your needs and tightly integrates with any existing or additional systems your city uses.
- Transform with your city and its needs, continuously improving and bringing new ideas and channels to the table.
- Work around your needs and your budget, with long-term viability and flexibility that means you don't have to worry about investing in a new technology 6 months down the line.
- Keep your citizens' personal information secure with strict security and compliance codes that remove the worry of a data leak or breach.
- Include support costs in your calculations for budgetary and planning purposes.
- Provide exceptional (and ongoing) support for our partners.

No matter who you choose to work with, knowing what to ask of your vendor will help ensure you never get left with a problematic system that doesn't serve you or the public.

[LEARN MORE ABOUT 3DI ENGAGE](#)



# Conclusion

In today's world, citizen self-service is so much more than just 311.

Starting the journey to omnichannel citizen self-service can be daunting. But keeping pace with the citizens' and local businesses' needs and fulfilling the services with the highest possible level of customer experience is a crucial responsibility of local governments.

By following the recommendations in this guide, benchmarking against customer experience leaders in the private sector (such as Amazon, Netflix, and Apple), and embracing the right technology to support your efforts, you can be well on your way to providing the solutions that meet the public's expectations. Ultimately, you'll enjoy an increased engagement, greater satisfaction, and more trust from your community.



## Learn More About 3Di

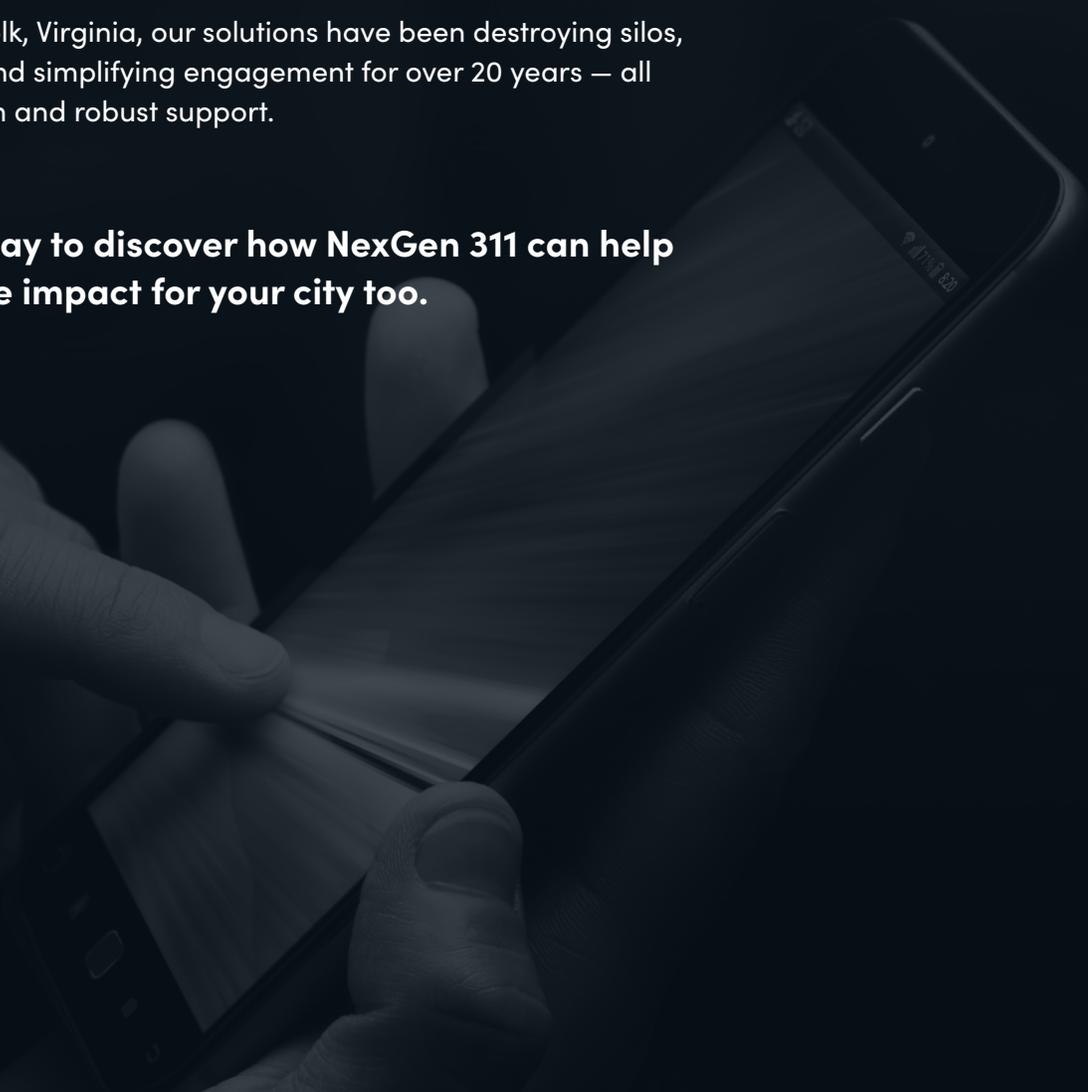
At 3Di, we create powerful software solutions that empower governments and organizations to create stronger communities. Places where people feel safer, more engaged, and full of hope for their futures.

Even though local government employees across the country work tirelessly to advance these goals, many don't have the right tools for the job. We're here to change that.

From Los Angeles to Norfolk, Virginia, our solutions have been destroying silos, streamlining processes, and simplifying engagement for over 20 years — all with rapid implementation and robust support.

**Request a demo today to discover how NexGen 311 can help you create a positive impact for your city too.**

[REQUEST DEMO](#)

A hand holding a smartphone displaying a mobile application interface. The phone is held in a way that shows the screen clearly. The background is dark and out of focus.