Virginia Association of Counties

ACHIEVEMENT AWARDS

SUBMISSION FORM

All submission forms must include the following information. Separate submission forms must be turned in for each eligible program. **Deadline: July 1, 2025.** Please include this submission form as the first page of your electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact **Gage Harter**.

PROGRAM INFORMATION

County: Chesterfield County

Program Title: Tenant Move-In Process Revision

Program Category: Customer Service & Community Outreach

CONTACT INFORMATION

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Name: George Hayes

Title: Director of Utilities

Signature:

2025 VACo Achievement Awards

Tenant Move-In Process Revision

I. Executive Summary

The Chesterfield County Utilities billing & customer service tenant move-in process revision was implemented to streamline follow-up for required leases, identification, and deposits when a tenant establishes utility services. The process involves a shared spreadsheet for Customer Service Representatives (CSRs) to list tenant accounts for follow-up if they cannot obtain the required deposit and documents during the initial call. The shared spreadsheet is reviewed weekly by a designated CSR who sends follow-up notifications to the tenant and schedules service orders for service interruption when necessary. Prior to implementation, each CSR followed up on their own tenant accounts with missing documentation or deposits. Over time, this task became overwhelming for CSRs due to the increasing volume of tenant move-ins, resulting in an increasing number of tenant accounts without the required deposit and documentation. The program has been extremely successful, providing efficiency and minimizing accounts without required documents and deposits.

II. Need and Context

Chesterfield County Utilities requires all tenants to provide a lease, identification, and deposit to establish a new account. Before March 2020, the move-in process required tenants to come to the office to set up a new account. New tenant accounts were not established unless all documentation and a deposit were provided. The process required very little follow-up. Beginning in March 2020, tenants were able to complete the move-in process via telephone, to accommodate COVID-19 precautions. This new process required all Customer Service Representatives (CSRs) to follow-up on tenant accounts they opened with missing documentation or deposits while also answering incoming calls and handling daily tasks. Each CSR managed the follow up process for their accounts using various methods. The CSR would resend notifications or call the customer to remind them of the missing items. If the CSR was not successful in getting the required items, they coordinated with the Field Services Manager to schedule a service order to disconnect the water. Over time, this follow-up process became overwhelming for CSRs, and they fell further behind on follow-ups for missing documentation and deposits. The number of tenant accounts without the required deposit and documentation increased, impacting account collections at move-out. Recognizing the need for a consistent, streamlined process for missing tenant documentation and deposits, especially for the call center CSRs, a CSR developed the tenant spreadsheet process.

III. Program Implementation

The tenant spreadsheet process was created with feedback from CSRs and management in August 2024 and implemented on September 19, 2024. The CSRs were provided access to a shared spreadsheet with the required fields to be completed if they opened a tenant account without a deposit or all required documentation. An email with a link to the spreadsheet and process instructions was sent to all CSRs and discussed individually with each CSR. This process created a central space for all tenant accounts requiring follow-up to be captured and updated on a shared Excel spreadsheet. If the tenant requirements are not met by the specified deadline, a senior CSR follows up with the tenant providing an additional notification of requirements via email or letter. If the requirements are not met, the senior CSR creates a service order and notification to be hung when services are disconnected. The senior CSR creates a service order to restore services once the tenant meets all requirements.

IV. Cost and Funding

No additional costs were incurred to develop and implement the tenant spreadsheet process. Cost continues to stay at a minimum, using nearly 100% email for customer notifications. When interruption of service is necessary, a field services technician is dispatched to complete the service order.

V. Results and Impact

The tenant spreadsheet process helped to increase deposit collections, increased efficiency within the call center, helped deter fraud and provided insight to further streamline processes. CSRs opened 1,025 tenant accounts since the initial implementation of this process on September 19, 2024, with 787 (77%) accounts added to the spreadsheet for missing documentation or deposits. Currently, only 2 accounts do not have the required deposit. This equates to $157,400 generated for deposits, strengthening the department’s collections efforts if the tenant moves out and does not pay the final bill.

With one main point of contact for follow-up, efficiency increased within the call center and field services. The senior CSR can coordinate with the CSRs opening accounts as needed and scheduling service orders based on availability within field services. The senior CSR can provide updates in a uniform space without notifying each CSR who opens tenant accounts of items emailed or other contacts.

VI. Innovation

An unexpected positive by-product of this process is more accurate billing when a prior tenant does not call to disconnect service. Prior to this revised process, tenant accounts were opened with trust that the tenant would provide the lease and deposit. The CSRs did follow up with the new tenant but did not have much recourse if the deposit or documents were not provided, as COVID-19 mandates restricted disconnections. Since implementing the tenant spreadsheet process, numerous accounts were found in a previous tenant's name. One new tenant did not establish service until the account was disconnected for non-payment of services. Once the new lease was provided, we confirmed the new account start date and billed the current tenant. This process also provided insight to further streamline the move-in process to include a uniform welcome email or letter providing the account information, payment options and instructions for monitoring their water usage with our new AMI software application EyeOnWater.

The tenant spreadsheet process is deserving of a VACo award for the use of information technology because this program has not only streamlined a tedious manual process but has also improved the team-oriented environment Chesterfield County Utilities fosters within Billing and Customer Service. When the call center volume is low, CSRs can review the spreadsheet and provide updated information as a backup to the senior CSR. Since it is a shared spreadsheet, everyone can see who is also working in the spreadsheet. The process adds a layer of accountability to the call center CSRs, to ensure accounts have accurate contact information. The process also provides opportunities for training. Attention to detail is crucial when processing a move-in; for example, the account opened at 123 Right Street but should have opened at 123 Right Road. This improved process meets the outlined criteria because it enhanced the level of working conditions in the call center, provided training scenarios, and positively impacted staff morale by seeing an idea they suggested implemented and recognized. The process empowered CSRs to explore other learning opportunities with Microsoft programs to find simple solutions to day-to-day challenges.