

Purpose

The purpose of this document is to describe the steps in effectively handling customer enquiries whether it is by telephone, face-to-face, letters, emails or fax and to document the tracking and monitoring of all customer contact.

Scope

This document describes handling customer enquiry procedures to ensure customers are directed appropriately and are provided with accurate and timely responses or agreement of future actions.

References

Building Act 2004, (BA2004) section 12 (2)(k)

BLD-3.0-POL, Managing a customer enquiry

BLD-3.1-FLOW, Managing a customer enquiry

BLD-40.2-PROC, Complaints process during building construction

BLD-68.0-POL, Customer complaints

Roles and responsibilities

Building control manager: Ensures that building officials have the appropriate competence to undertake the required procedures.

Principal building officer: Provides technical guidance documentation and determination.

Quality manager: Audits policies and procedures around customer enquiries.

Building official: Provides technical information to customers.

Streamer: Enters the relevant details into the computer system to record the transaction and lodgement details.

Administrator: Undertakes the relevant administrative tasks when providing non-technical support to customers.

Abbreviations

BA2004	Building Act 2004
BCA	Building consent authority
EDMS	Electronic data management system
GIS	Graphic information system
PLA	Prelodgement application
TA	Territorial authority

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Procedure

Enquiries by post, email or online via the website, or fax are routed to the most appropriate contact for assistance. The first step in handling a customer enquiry is to clearly establish the nature of the enquiry. If the enquiry requires a point in the right direction, details about the customer is not recorded. If the enquiry is regarding a building matter, all such requests are logged into a prelodgement application (PLA) system. In the case of phone enquiries: the requests for technical advice are directed to the customer's architect, engineer, draughtsman and supplier. General procedural enquiries are not recorded. If the enquiry relates to a specific building project the enquiry is logged into a PLA system.

Procedure

Step #	Description	Responsibility
1	<p>Establish what the customer is enquiring about</p> <p>If the enquiry is about a building issue find out what in what area the customer needs assistance in. Some of the available options are:</p> <ul style="list-style-type: none"> • Building • Planning • Property information • Payments • Appointments • Status of applications • Seek meeting with staff member • Development drainage engineers. 	Streamer
2	<p>Log customer into PLA</p> <p>The streamer enters the customer's details into the PLA system. This will place the customer in a queue for the appropriate section.</p>	Streamer
3	<p>Select customer form PLA queue</p> <p>If the customer has been in to council before, the customer's name is displayed in the relevant field.</p>	Streamer
4	<p>Explain the information required</p> <p>Discuss the customer's request by providing the relevant information from one or more of the following sources:</p> <ul style="list-style-type: none"> • GIS • EDMS – Site File Viewer • NZ Building Code Documents • NZS Standards • Brochures and pamphlets 	Building official
5	<p>Is further information required from another section?</p> <p>If the customer needs to discuss matters with someone another department, the customer's details are copied and placed in the queue again.</p>	Building official
6	<p>Sign-off customer in PLA</p> <p>When the customer enquiry is complete, update and sign the customer enquiry closed in the PLA system.</p>	Building official

Step #	Description	Responsibility
7	Transfer customer to relevant section in PLA If the customer requires further information that is not provided by the Building Official, the customer's details are transferred to the appropriate section using PLA. If the request cannot be incorporated within the PLA system, the customer may be sent or the call transferred to the relevant department. Note: for mailed and appointment transactions a new transaction needs to be generated.	
8	Customer phone enquiry closed Enter the information into an Excel spreadsheet to record a summary of the type of call. The spreadsheet is forwarded to the Team Coordinator at the end of each day.	

Variations – location based

Great Barrier Island and Waiheke Island

The availability for customer or telephone enquiries is limited. When information cannot be provided, the customer enquiry is forwarded to Auckland City Environments (ACE) office at Graham Street.

Administration screens the enquiries: For non-technical support, this is provided by using various resources such as site files, leaflets WorkSmart/Pathway, forms

For technical support the enquiry is directed to a building official. Various available sources include:

- Drainage plans
- Aerial photos/maps
- Hauraki Gulf District plans
- Standards
- Manuals
- Building code
- Site file
- GIS.

If the customer requires no further information, the customer enquiry is complete.