

2025 Customer Service Strategy

Oregon Real Estate Agency

The Oregon Real Estate Agency (OREA) has established and maintained a culture of service excellence that supports our mission to provide quality protection for Oregon consumers of real estate, escrow, and land development services. Our commitment to exceptional customer service is demonstrated through consistent achievement of key performance measures, including maintaining above 93% customer satisfaction and completing investigations within 150 days. This strategy builds upon our proven track record and outlines initiatives to enhance service delivery, focusing on responsiveness, equity, accessibility, and professionalism across all areas of OREA's operations.

Whether serving internal or external customers, we emphasize timely and accurate service across all divisions. By aligning our approach with the agency's core values of Equity, Respect, Transparency, Adaptability & Innovation, Stewardship & Customer Service, and Accountability, we ensure that every interaction reflects our dedication to integrity and contributes to OREA's overarching goals.

Current Agency-Wide Service Standards

OREA's established service standards, as found in the Agency's Customer Service Policy, demonstrate our commitment to responsive, professional interactions across all divisions, ensuring that both external and internal customers receive consistent, professional, and timely responses.

Each division within the Agency contributes to our service excellence:

- **Licensing Division** serves as the primary point of contact for public inquiries and initial complaint intake. Their screening process ensures effective routing of concerns to appropriate divisions.
- **Regulation Division** manages investigation communications with a structured process that maintains professionalism throughout the investigative process.
- **Compliance Division** specializes in trust account reviews and provides educational guidance on compliance matters, maintaining clear communication throughout the review process.
- **Land Development Division** provides support for attorneys, land developers, timeshare companies, and homeowner associations, offering guidance through complex regulatory requirements.

- **Administrative Services** serves as the foundation of our internal service excellence, supporting all divisions with IT, accounting, human resources, procurement, and facilities management.

Service Level Goals and Implementation

Building on OREA's established strong service standards, our strategic goals focus on ensuring consistent communication delivery, measurement, and improvement of these standards:

These goals support our commitment to maintaining high service standards while adapting to changing needs and technologies. Progress toward these goals will be measured through our established quality assurance framework and regular stakeholder feedback.

GOAL 1: ENHANCE COMMUNICATION AND UNDERSTANDING OF SERVICE STANDARDS

We will strengthen awareness and implementation of our established service standards through:

- Integration of service standards into new employee onboarding materials.
- Quarterly review of standards in all-staff meetings.
- Development of a quick-reference guide for staff highlighting key service expectations.

GOAL 2: IMPLEMENT COMPREHENSIVE SERVICE STANDARD TRACKING

To ensure consistent delivery of our established standards, we will:

- Evaluate existing tracking mechanisms and identify gaps in current monitoring systems.
- Research tracking methods for service standards not currently tracked, including automated tracking mechanisms for response times via email.
- Implement feedback loops for continuous improvement for the website through use of SiteImprove.
- Design early warning systems for potential service delays.

GOAL 3: MODERNIZE SERVICE DELIVERY SYSTEMS

The implementation of our new licensing system in 2026 will transform our service capabilities through:

- Streamlined application and renewal processes with intuitive user interfaces.
- Enhanced self-service options for licensees including status tracking and document management.
- Improved internal workflow management to reduce processing times.
- Integration of automated compliance tracking.
- Enhanced reporting capabilities.
- Mobile-friendly interfaces that allow access to services from more device types.
- Secure document upload capabilities that reduce paper processing.

GOAL 4: STRENGTHEN CROSS-DIVISION SERVICE COORDINATION

To improve internal service delivery and collaboration, we will:

- Establish clear service level agreements between divisions.
- Create standardized processes for cross-division requests that reduce handoff delays.
- Implement shared project management tools.
- Develop metrics for measuring inter-division service efficiency.
- Regular review of internal service bottlenecks and develop solutions.

Digital Services

The cornerstone of our strategy is the 2026 implementation of a modern licensing system. OREA will support the transition by:

- Developing user guides and support materials for the licensing system.
- Creating tutorial videos to assist licensees with system navigation
- Reviewing OREA's website and making needed content updates to align with new system.
- Creating and implementing a change management strategy.

Primary Communication Channels and Expectations

OREA's service delivery framework operates through multiple channels, with specific expectations established for each division to ensure consistent, high-quality customer service.

EXTERNAL COMMUNICATIONS

Licensing Division

- Serves as primary point of contact for public inquiries via phone, email, and in-person visits.
- Expectations:
 - Answer 95% of calls within 60 seconds with less than 3% abandonment rate.
 - Provide accurate information about licensing requirements and application processes.
 - Screen and route complaints appropriately to other divisions.

Regulation Division

- Manages communications related to complaint investigations and regulatory actions.
- Expectations:
 - Provide clear timelines to all parties involved in investigations.
 - Ensure all written communications follow established templates for consistency.
 - Document all investigation communications in case management system.
 - Provide clear explanations of regulatory decisions and next steps.

Compliance Division

- Handles communications related to trust account reviews and compliance education.
- Expectations:
 - Schedule compliance reviews with at least 10 business days notice to licensees.
 - Provide clear written instructions for document submission requirements.
 - Review and close within 60 days.
 - Offer technical assistance for corrective actions when needed
 - Develop and maintain educational resources on common compliance issues.

Land Development Division

- Provides guidance on subdivision, condominium, timeshare, and campground regulations
- Expectations:
 - Offer pre-application or pre-filing consultations.
 - Process applications or filings established timeframes.

- Communicate status updates during the review process.

Digital Platforms

The Oregon Real Estate News-Journal (OREN-J) serves as the primary channel for updates to real estate license laws, rules, and procedures.

- Expectations:
 - Review website content quarterly for accuracy and relevance.
 - Update forms and applications within five business days of approved changes.
 - Ensure all digital content meets accessibility standards.
 - Monitor website analytics to identify improvement opportunities.

OREA's website, YouTube channel and licensing system content is managed by the Communication, Policy, and DEI Director in collaboration with the Administrative Services Division

- Expectations:
 - Publish OREN-J quarterly with consistent, predictable release dates.
 - Include timely updates on regulatory changes and requirements.
 - Feature educational content based on common compliance issues.
 - Distribute to all subscribed licensees via email with web archive maintained.
 - Monitor readership metrics to optimize content strategy.

INTERNAL SERVICE EXPECTATIONS

Administrative Services Division

This division provides critical internal support services that enable all other divisions to deliver excellent external customer service. Specific service expectations include:

Information Technology Services

- Expectations:
 - Acknowledge service desk emails within two hours
 - Resolve critical issues within four hours.
 - Resolve non-critical issues within three business days

Procurement Services

- Expectations:
 - Process standard purchase orders within three business days
 - Provide procurement guidance within two business days
 - Complete contract reviews within five business days

- Process vendor payments within five business days of approval

Accounting Services

- Expectations:
 - Process expense reimbursements within five business days

Management Team

- Expectations:
 - Provide timely feedback on employee performance issues
 - Facilitate cross-division collaboration as needed
 - Conduct quarterly check-ins.
 - Support staff with resources needed to meet service standards

INTERNAL COMMUNICATION CHANNELS

OREA maintains several internal communication channels to ensure staff remain informed and engaged, which directly supports our ability to provide excellent customer service:

Employee Newsletter

- Published monthly with updates on agency initiatives, policy changes, and employee recognition
- Managed by the Communication, Policy, and DEI Director

All-Staff Meetings

- Held monthly to share agency-wide updates, trainings, and achievements
- Include quarterly review of customer service standards and performance metrics
- Provide forum for staff questions and feedback

Division Meetings

- Conducted bi-weekly within each division
- Address operational issues affecting service delivery
- Share best practices and success stories

Microsoft Teams

- Agency-wide channel for important announcements and updates

Equity, Accessibility and Inclusion

Our commitment to diversity, equity, and inclusion is fundamental to our service delivery. OREA's Affirmative Action/Diversity, Equity, and Inclusion Plan is integrated into how we conduct business and how we serve the diverse citizens of Oregon.

We strive to ensure our services are accessible by:

- Ensuring all digital services meet accessibility standards.
(<https://www.oregon.gov/eis/Documents/Federal%20Accessibility%20Rule%20FAQ%20Final.pdf>)
- Providing materials in alternative formats upon request.
- Offering language assistance services in Spanish with additional languages available upon request.
- Regularly reviewing website accessibility compliance through automated tools.
- Implementing plain language standards across all public-facing communications

OREA is working toward improving cultural responsiveness by developing a comprehensive DEI communication strategy that includes aligning service delivery with the needs of the public and training staff on cultural competency and inclusive service practices.

Implementation Timeline

QUARTER 2, 2025

- Develop and implement training on customer service standards.
- Begin research of issue tracking system for I.T. service requests and Licensing email inquiries.
- Create FAQs for Licensing Division to standardize responses to customer service inquiries.

QUARTER 3, 2025

- Conduct staff training on updated customer service standards
- Develop and distribute standardized email templates for common inquiries
- Research customer service staff training opportunities.
- Create onboarding materials related to customer service standards.

QUARTER 4, 2025

- Refine email templates and response protocols based on initial feedback.

- Procure and implement issue tracking system for I.T. service requests and Licensing email inquiries.

Quality Assurance

OREA will assure quality on three tiers.

MONTHLY REVIEW

OREA will analyze call volumes and response rates, email response rates, and service trends. Insights will be shared with the management team.

QUARTERLY REVIEW

Regular assessment of the FAQ webpage and other customer resources based on common issues and identify needed process adjustments.

ANNUAL ASSESSMENT

OREA will complete a comprehensive review of service metrics and refine its customer service strategy based on the new licensing system implementation outcomes.

Success Metrics

Success will be measured through:

- Maintenance of 93%+ customer satisfaction in annual surveys.
- Compliance with response time standards.
- Positive trends in website usage analytics.
- Reduction in follow-up contacts needed to resolve inquiries.
- Increased usage of self-service options