

311 PLANNING GUIDE

Installing Bright Pattern AI-Powered Omnichannel Contact Center Software in a 311 / Citizen Services Center

How to use this guide: This planning guide is designed to help city leaders and 311 program owners scope, sequence, and launch a modern, AI-powered 311 operation. It is intentionally practical and checklist-driven so it can be used as a gated asset in a campaign and as a working playbook in early project stages.

1. Executive overview: what modern 311 requires

Residents expect 311 to be fast, consistent, and available across voice and digital channels. At the same time, cities face budget constraints, staffing pressure, and more frequent demand spikes. AI-powered contact centers help 311 teams increase self-service completion, improve agent productivity, and create a unified view of citizen demand and service delivery.

What an AI-powered 311 contact center enables:

- Conversational IVR and self-service menus for 311 to reduce misroutes and frustration.
- True omnichannel citizen service (voice, email, chat, SMS/text) with consistent routing and reporting.
- Agent Assist (teleprompter + next-best actions) to standardize quality and speed resolution.
- Real-time transcription, summarization, and note-taking to reduce after-call work.
- Sentiment alerts and AI-supported quality management to improve oversight and coaching at scale.

Recommended implementation approach

For demand-generation and early planning, we recommend positioning implementation as a practical, phased modernization program: start with the highest-volume 311 call drivers, launch a measured pilot, then expand channels and AI capabilities in controlled iterations.

Typical 16-week roadmap (example)



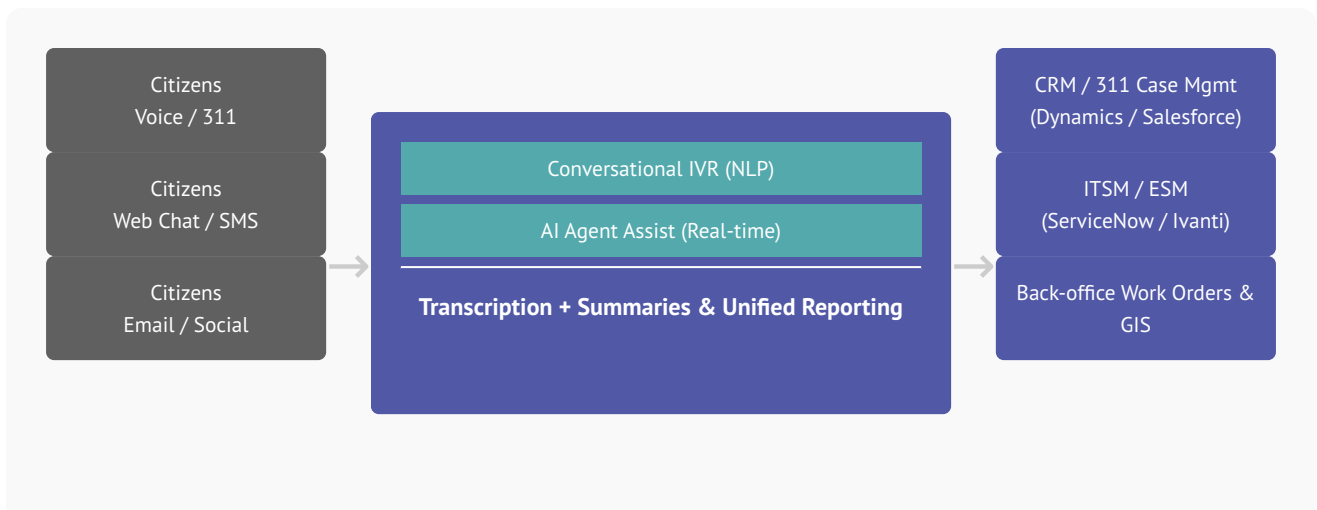
2. Readiness checklist (before you configure anything)

Workstream	Decisions / Inputs	Outputs
Service Catalog	Top 10–20 311 reasons for contact; service owners; hours; escalation rules	Prioritized call-driver list; routing map
Channels	Which channels to launch Day 1 vs Phase 2 (voice, chat, SMS, email)	Channel rollout plan
Knowledge	Existing FAQs, scripts, department policies, multi-lingual needs	Knowledge base + scripts for Agent Assist
Case / CRM / ITSM	System of record (311 CRM/Case Mgmt, ITSM, work orders, GIS)	Integration requirements
Security & Compliance	PII policy; recording policy; retention; access control	Security checklist + data handling rules
KPIs	Baseline ASA/AHT/FCR; self-service containment; CSAT; backlog	Measurement plan + dashboard requirements

Tip for demand-gen packaging: Include a simple self-assessment (score 1–5) for each readiness area. Cities can quickly see where they need help—and request a briefing.

3. Reference architecture (311 citizen journey to back-office fulfillment)

A modern 311 contact center must connect front-office citizen interactions (voice + digital) to back-office fulfillment systems. This interoperability reduces repeat contacts, improves visibility into service status, and supports proactive notifications.



4. Implementation roadmap (phased, low-risk rollout)

Phase 0 – Discover (Weeks 1–2)

- Confirm service catalog and top call drivers (volume + pain).
- Document current routing, SLAs, and escalation paths.
- Baseline KPIs (ASA, AHT, abandonment, FCR, channel mix).
- Identify system-of-record (CRM/311, ITSM, work orders, GIS).

Phase 1 – Design (Weeks 3–4)

- Define Day 1 channels (typically voice + one digital channel). Design scenario flows and service skills by call driver.
- Select AI virtual agent strategy for conversational IVR (and language needs).
- Define Agent Assist intents/suggestions for the top interactions.

Phase 2 – Build & Integrate (Weeks 5–10)

- Configure services, teams, skills, service levels, and scenarios.
- Connect dial-in numbers, SMS access numbers, and scenario entries.
- Set up integration accounts (CRM/ITSM + STT/TTS + AI virtual agents).
- Stand up reporting dashboards and quality/recording configuration.

Phase 3 – Test, Train, Go-Live (Weeks 11–16)

- Run functional tests (routing, escalation, transfers, callbacks if used).
- Run conversational IVR tests (silence/DTMF/timeouts, fallback to agents).
- Train agents and supervisors; run a soft launch with limited call drivers.
- Go-live; monitor KPI deltas daily; tune scenarios and AI suggestions.

Expected performance improvements (evidence-based)

Metric	What to measure	Evidence examples
Agent productivity	AHT, ACW/after-call work, FCR	AI Agent Assist outcomes reported: 40–60% handle time improvement; 25–35% first-call resolution increase

5. Configuration playbook (voice + digital channels)

5.1 Inbound voice (recommended configuration order)

Bright Pattern documentation recommends a clear order for configuring inbound voice services. This sequencing helps teams avoid rework and ensures service-level and routing logic is defined early.

1. Create and configure an inbound voice service (general settings).
2. Assign teams to the service; use default service skill.
3. Create any auxiliary skills required.
4. Assign auxiliary skills to agents (with skill levels).
5. Specify service level thresholds.
6. Create the interaction processing scenario.
7. Specify dial-out info for outbound consultation calls (if used).
8. Set up periodic call recording exports (as needed).
9. Configure caller ID for outbound SMS communications (if used).
10. Associate scenarios with access numbers (scenario entries).

5.2 Digital channels (chat + SMS/text)

Digital channels are most effective when they share the same routing logic and reporting model as voice. Plan for consistent categorization (reason codes) and unified reporting across channels.

For chat services, Bright Pattern documentation calls out omnichannel routing settings such as the number of sessions agents can handle simultaneously and configuring SMS access numbers.

6. Conversational IVR (AI self-service) for top 311 call drivers

6.1 What you need before configuration

- Choose an AI agent strategy and build your initial dialog flows.
- Create integration accounts for Speech-to-Text (STT) and Text-to-Speech (TTS) engines
- Provide your 311 IVR scenario template..

6.2 Scenario design pattern (recommended)

A practical pattern for 311 conversational IVR is: greet → listen → ask the AI virtual agent → (repeat up to N tries) → route to a skilled agent with a screen-pop of the transcript and collected data.

Key scenario blocks called out in Bright Pattern documentation include:

- **Play-Listen (TTS + STT):** plays prompts and captures the caller's response.
- **Ask AI virtual agent:** sends the captured phrase to the AI virtual agent and receives suggestions.
- **Find Agent + Connect Call:** routes and delivers the interaction when self-service is not helpful.
- **Web Screen Pop:** sends transcript/collected data to the agent desktop.
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7. AI Agent Assist (real-time suggestions) for faster, more consistent 311 resolution

7.1 Why it matters for 311

311 calls often require agents to interpret policy, confirm eligibility, and route to the correct department. Agent Assist provides timely, context-based guidance directly within the agent desktop during live interactions, improving consistency and speed.

7.2 Quickstart configuration (high level)

1. Create and test intents for the phrases/topics you want to detect.
2. Create a suggestion set (guidance text, links to KB articles, optional auto-open links).
3. Test the suggestion set using interaction samples.
4. Assign the suggestion set to one or more services and enable suggestions.
5. Verify suggestions appear correctly in Agent Desktop.

Prerequisites highlighted in the Bright Pattern quickstart include user privileges and enabling real-time transcription properties on services.

ROI signal: Bright Pattern's AI Agent Assist announcement reports customers seeing 40–60% improvements in handle time and 25–35% increases in first-call resolution.

8. 311 pilot plan (first 30–60 days)

A pilot should be measurable, limited in scope, and focused on high-volume citizen needs.

Pilot selection criteria

- Top 5–10 call drivers by volume (and/or highest dissatisfaction).
- Clear routing outcomes (one department owns resolution or clear escalation).
- Availability of existing scripts/FAQs to power bot flows and agent guidance.
- Defined success metrics (containment, ASA, AHT, FCR, abandonment, CSAT).

Pilot deliverables

- Conversational IVR for 2–3 intents (voice) with fallback to agents.
- One digital channel (web chat or SMS) for the same intents.
- Agent Assist suggestion set for the same intents.
- Baseline + post-launch KPI dashboard; daily tuning cadence.

9. Measurement and optimization (make the gains stick)

KPIs to baseline and track

- Service level (e.g., % answered in 60 seconds), average speed of answer (ASA)
- Abandonment rate + peak-hour performance
- Average handle time (AHT) and after-call work (ACW)
- First-contact resolution (FCR)
- Self-service containment/deflection (voice + digital)
- Quality evaluation coverage + coaching outcomes

Operational tuning cadence

- **Daily:** review top intents, misroutes, bot fallbacks, and failed self-service sessions.
- **Weekly:** update bot dialog flows, add intents, refine suggestion sets, adjust service skills.
- **Monthly:** cross-department review of 311 demand patterns and back-office cycle times.