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TO: GENERAL COMMITTEE


SUBJECT: CUSTOMER SERVICE PLAN

WARD: ALL

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SUBMITTED BY: R. JAMES-REID  
EXECUTIVE DIRECTOR ACCESS BARRIE

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EXECUTIVE DIRECTOR ACCESS BARRIE

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CHIEF ADMINISTRATIVE OFFICER

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**RECOMMENDED MOTION**

1. That the Customer Service Plan detailed in Appendix "A" to Staff Report ACC001-14, be approved in principle as a planning document.
2. That staff in Access Barrie prepare the business case for the overall Customer Service Plan for consideration as part of the 2015 Business Plan. Implementation plan(s) associated with the 2015 phase initiatives contained within the Customer Service Plan to be brought before Council for approval in 2015.

**PURPOSE & BACKGROUND**

3. The purpose of this staff report is to provide recommendations for the Customer Service Plan for the Corporation in response to fulfilling Council's Strategic priority to Improve and Expand Community Involvement and City Interactions.
4. In 2010 Council developed a Strategic Plan for the 2010 – 2014 term of Council to advance the Vision for the City. One of the strategic priorities is to Improve and Expand Community Involvement and City Interactions through the development a Customer Service Strategy and enhance customer experiences.
5. Through the Corporate reorganization in May 2013, the strategic portfolio of Access Barrie was created to consolidate the areas of communications and marketing, inter-governmental affairs and a newly created customer service branch. The responsibility of the Customer Service branch is to develop, lead and implement the customer service strategy for the Corporation.
6. A cross departmental Customer Service Team was formed in November 2013 and has adopted the Executive Management Team (EMT)'s mission for Customer Service, as follows:

*To build a customer focused organization responsive to the community where all staff understand and embrace their fundamental role as one of serving the Community.*

## ANALYSIS

7. The Customer Service Team undertook the following activities to develop the Customer Service Plan:

### Internal Review

8. Staff engaged all departments and EMT to create a vision and plan for developing the Strategy, including a comprehensive review of current customer service standards, practices, needs/challenges and barriers. The review included the following;
- a) In depth interviews with each department management team to review strengths, weaknesses, opportunities and challenges with their current customer service models;
  - b) Conducted internal focus groups with 40 front-line customer service staff and 19 Supervisors and Managers on their views of various models for service delivery;
  - c) Observed front-line customer service staff in action across the corporation to see first-hand the complexity of customers' needs as well as the demands on staff; and
  - d) Launched an online Customer Service Suggestion Forum for staff to help identify opportunities for improving customer service right away.

### Findings of Internal Review

9. Customer expectations are growing as customers now expect public service to match private sector systems and levels. The resulting increases in demand for service cannot be handled by our current systems and processes. Additional findings include:
- a) A strong focus amongst staff on customer service and recognition of its importance. Employees are knowledgeable, aspire to high standards, work hard and actively look to be innovative where possible.
  - b) Weakness/opportunities in our current customer services were identified including:
    - i) Too many points of access for customer service which may be confusing or frustrating for the customer. With over 60 core services as well as numerous non-core services, it is challenging to keep up to date on the most current and accurate information responses;
    - ii) Outdated Customer Service systems which rely heavily on manual processes;
    - iii) Customer Service is being delivered through department specific models and does not respond well to peaks and valleys of demand;
    - iv) Inconsistent or lack of methods to track customer service interactions and the associated management to define service levels and best practices;
    - v) Information regarding City services is inconsistent between the various channels of access, online, at counters or on the phone;
    - vi) After Hours Non-911 Emergency Calls are no longer a good fit for service being provided through Fire dispatch services; and
    - vii) Training opportunities for staff are not specific enough for the customer expectations that are presented;
  - c) There are many opportunities to effect change and improvement but there are limiting factors which include:
    - i) Multiple projects have high needs for resources of staff and funding;

- ii) Volume of work limiting opportunities to challenge the status quo;
  - iii) Legislative requirements;
  - iv) Employment agreement limitations; and
  - v) Major third party contracts such as transit and waste where the customer service standards may be contract defined and not managed or controlled by city staff; and
- d) With the expected growth in demand for service due to the Provincial Growth Plan and opening of the South Annexed lands for development, our current systems will not be sustainable.

#### External Review

10. The Customer Service models of 13 municipalities were studied including Guelph, Kingston, Brantford, Oakville, Sudbury, Newmarket, Hamilton, County of Simcoe, Ottawa, Chatham-Kent, Halton Region, Ajax and City of Kawartha Lakes. As part of the review, staff:
- a) Reviewed industry best-practices in both municipal and private sectors. The Corporation also connected with leading organizational groups such as the Institute for Citizen-Centred Service and became members of the Municipal Service Delivery Organization (MSDO);
  - b) Gathered public feedback through a variety of methods including:
    - i) The 2013 Citizen Satisfaction Survey, conducted by FORUM Research, which polled 1,000 residents about satisfaction levels with the customer service they received from the City (November 2013);
    - ii) A Customer Experience Survey that was available online and was also conducted in-person at the Parkview Centre Living Well Fair, Celebrate Barrie and at the Holly Community Centre. 428 responses were received (June 2013);
    - iii) A phone survey of 750 residents and 75 businesses conducted by Oracle Poll in July 2013; and which queried customer preferences for how they would like to conduct transactions with the City; and
    - iv) Consulted with the Accessibility Advisory Committee and Seniors Advisory Committee.

#### Findings of External Review

11. As is the case for the City of Barrie, customer service is a high priority for most levels of government. Providing consistent, reliable, efficient and effective information for customers where, when and how they want it is viewed as a best business practice. Some highlights include:
- a) Most municipalities are moving towards similar styles of customer service solutions including one-stop service counters, central contact for phone and email, expanded services at satellite locations, focus on online services and contracting out after hours call services;
  - b) Technology solutions to automate processes, standardize tracking, and collect, store and analyse information is integral to success;
  - c) A Citizen Survey was conducted in July 2014 by Oracle Poll Research of 750 residents. The results indicate a strong preference for focusing on increasing online opportunities (specifically the website) and consolidating services on the phone, through email and at counters. Expanding hours of service at City Hall was not viewed as a priority. The same

poll conducted with 75 businesses indicated a preference for online solutions and one-stop counter service; and

- d) Partnerships with neighbouring municipalities and other levels of government is an emerging opportunity being explored by many other municipalities once they have established customer service competencies.

### Vision

- 11. The Customer Service Team established that the vision for customer service strategy is to enhance the customer service experience through timely delivery, ease of access, and a commitment to treat everyone, customers and employees with respect. Delivering a customer service experience that exceeds expectations is the goal. This will be achieved through building trust, strengthening relationships with customers and enhancing perception regarding value for service.
- 12. The Strategy is built upon the following Key Values:
  - a) Knowledge – ensuring that staff has the skills, tools and information required to provide accurate and excellent customer service;
  - b) Respect – treating all customers with dignity, fairness and professionalism using an efficient, consistent and effective approach;
  - c) Timely – responding to customer needs in a coordinated and prompt fashion;
  - d) Accessible – providing services in a manner that is easy to use and meets our customers' needs; and
  - e) Adaptable – utilizing customer feedback to measure and improve work processes and implement innovative ideas to respond to changing customer expectations.

### Goals and Recommendations

- 13. Resulting from the reviews the following goals and recommendations were established. They include:
  - a) Enhance Customer Services access options:
    - i. Create a Call Centre that merges most of the 40+ existing City of Barrie phone numbers into one number 705-726-4242 that customers can call to access most City Services;
    - ii. Enhance the website to provide more City of Barrie services online. Customers will have access to more self-serve options through the website, mobile applications, social media and the introduction of new technology channels as appropriate.
    - iii. Provide a “One Stop Experience” through the creation of a Customer Contact Centre, where most general City of Barrie services already offered at City Hall would be available by visiting one counter location. The Customer Contact Centre would be the first point of contact for visitors, phone calls, email and social media requests for most City services. Customers will be able to pay for, inquire about, apply for, register for or tell us about City programs and services;

- iv. Provide Enhanced City of Barrie services at local Community Centres; and
  - v. Design new processes for the provision of After Hours service for non-911 emergency calls.
- b) Create a Customer Centred Culture that responds to the needs of our Customers;
- i. Empower staff to be innovative and make the best use of technology and resources;
  - ii. Reduce barriers to change, and encourage continuous improvement in customer service delivery;
  - iii. Ensure Customer Service is defined as a core competency for all employees and included as part of the recruitment and hiring strategy;
  - iv. Provide ongoing opportunities for both general and specific customer service training that addresses the various types of customer interactions;
  - v. Provide staff with the knowledge, tools and resources to provide top level customer service. This will include conducting regular internal focus groups for front line staff across the corporation to share and learn from the experience of their peers;
  - vi. Develop policies and identify consistent measurements for Customer Service that reinforce the common vision and goals;
  - vii. Integrate customer service performance metrics into work plans and align projects and activities with the Customer Service Strategy to make it part of the day-to-day corporate culture;
  - viii. Implement Quick Wins - Through ongoing consultation with Council, staff and customers and existing tools such as the online suggestion forums for both staff and customers, new opportunities will be identified and implemented on an ongoing basis;
  - ix. Celebrate Success – In cooperation with Human Resources and the Staff Strategic Plan, a corporate customer service excellence recognition program that rewards employees for their achievements, innovation, commitment and provision of customer service both internally and externally will be developed in 2015; and
  - x. Customer Service Week will be celebrated annually with workshops and forums for staff, public displays and awards. The inaugural celebration will be in October of 2014.
- c) Update and enhance Corporate Customer Service Guidelines
- i. Update Standards and protocols to reflect all access channels;
  - ii. Develop and publish service level expectations so the customer will understand the timelines associated with their service request for each department;
  - iii. Ensure consistency of process and timing with similar services across the corporation and across the various channels that a service is offered on;
  - iv. Provide ready access to a live person as an option with our phone channels;
  - v. Develop systems to easily update customers on the progress or status of lengthy inquiries, requests or transactions; and
  - vi. Develop a complaints resolution process

- d) Provide easily retrievable information for staff when responding to customers by;
- i. Developing a Knowledge Management solution for staff, with increased use of the website and InSite as an informational resource to provide all staff with consistent access to accurate, up-to-date information. This will require significant allocation of resources at the departmental and corporate levels. Ensuring processes are in place to consistently maintain and update the information housed on these systems will be critical;
  - ii. Developing and maintaining a quick list of department frequently asked questions to assist staff in all areas to provide easily retrievable answers to common customer questions.
  - iii. Establishing communication protocols to ensure we respond to our customers consistently across all channels (in-person, phone, online); and
  - iv. Increasing opportunities for cross departmental interactions through training and transaction based focus groups. The cross pollination of ideas and practices through direct interaction will lead to best practices being followed across the corporation.

- e) Provide technology solutions to monitor, track and analyze customer interactions and measure satisfaction levels:

- i. Invest in Customer Management and Knowledge Management Technology. Customer Management is the practice of managing relationships with our stakeholders. It allows for the tracking of an individual or groups of requests so that the history and status of work orders is readily available and quickly communicated to the customer. This is facilitated with technologies that capture customer interactions, organize information and automate processes to enhance customer service. This provides employees and management with information and tools to better meet customer needs.

A Customer Management System will provide customers with a more consistent customer experience. They will have confidence that their concerns and requests will be dealt with effectively and efficiently. There will be no need to repeat their requests to multiple staff as their interactions will be documented along with any follow up and trends.

A Customer Management System will allow Staff to track the volume, type and resolution of all inquiries from all channels. Staff will be able to view open and closed service requests for benchmarking and defining of actual service standards so resources and performance plans can be better aligned. This will allow the City to identify trends, highlight resource needs and measure its performance against defined standards. This will support better business planning. This knowledge will support staff to better serve the customers consistently, and maximize first contact resolution.

Using a phased approach the emphasis initially will be on contact tracking and development of the knowledge systems to increase the level of efficiency, effectiveness and consistency across the organization.

- ii. Enhance Phone Systems to support call centre functionality
- iii. Improve Self-Serve Opportunities by exploring new and emerging technologies that could be utilized as new or replacement channels of access.

- iv. Enhance Website Navigation so that customers can find or link to all online services easily.
- v. Develop Resident and Business Online Portals so that residents and businesses will be able to manage and track their city interactions through one sign in. Transactions from various platforms will be integrated into the portals.
- vi. Develop a Plan to migrate the customer to the best channel for service for the business they want to conduct.
- vii. Leverage existing and upcoming technology applications across departments where appropriate.

#### Implementation

14. The Customer Strategy will be implemented in phases as resources and capacity are realized. It is anticipated that it will need to evolve over the next 5 years. Successful implementation will require the commitment of all levels of the organization to value enhancing the customer experience. In order to achieve significant improvements in customer service, dedicated resources will be needed to develop and grow with the increasing demands of residents. It will require commitment from staff and departments to develop new processes to support the new service delivery model.
15. Access Barrie will be the lead for Customer Service, but all departments will have the mandate to make Customer Service a priority. Through extensive collaboration and planning the strategy will be implemented. Access Barrie will work with departments to define and document their customer service processes so that a consistency of delivery can be achieved across services and channels of service.
16. Immediate gains will be realized through regular review of process and procedures to capture and action "quick win" opportunities.
17. In order for integrated service delivery to be successful, extensive business process review must take place. The goal would be to reduce turn-around time and improve responsiveness. Opportunities for improvements will be sought so that the front line customer service staff can give quality referrals into clearly defined processes and workflows.

#### Customer Service Plan Phasing

18. 2014 Phase
  - a) Subject to Council's endorsement of the Customer Service Plan, the balance of 2014 will be used to continue assessing the resource requirements and to prepare and develop high level business and implementation plans. The planning process will include the development of dedicated cross departmental teams to assess current resources, capacity and limitations, and to determine the best plan for implementing individual projects. Consideration will be given to capacity within departments, changes to work plans and duties, and the associated costs of the various plans.
  - b) The planning will build upon existing "quick wins" that have been implemented this year including:

- i) Waste Diversion Containers available for pickup at Allandale Community Centre, Holly Community Centre and East Bayfield Community Centre along with enhanced parking permit availability;
  - ii) Launch of the City's free mobile app, PingStreet;
  - iii) Downtown and Waterfront Ambassador Pilot program;
  - iv) Redesigned for accessibility and openness customer areas on the first floor of City Hall with enhanced directional signage;
  - v) Front-line Legislated & Court Services staff equipped to do commissioning at courts;
  - vi) ROWA staff moving to the first floor at the Operations Centre to be more accessible to customers; and
  - vii) The ability for customers to leave voicemails after-hours on the main switchboard.
- c) Customer Service Week will be celebrated the first week of October and each subsequent year. Plans will be made to highlight existing customer service successes and raise awareness about the overall Customer Service Plan. To maintain the momentum of the Customer Service Plan, effort will be put into implementing "quick wins" that will enhance the customer experience.
19. 2015 Phase
- a) Staff in Access Barrie will prepare a business case for the overall Customer Service Plan for consideration through the 2015 Business Plan. Detailed implementation plan(s) for the 2015 phase initiatives of the Customer Service Plan will be presented to Council for approval in 2015.
  - b) Subject to approval of the 2015 Business Plan, plans will be implemented for the phased Call Centre start-up, improving the website and online services, and the pilot project for enhancing City services at Holly Community Centre. This phase will include the initial development of Customer Management and Knowledge Management Solutions, planning for space allocations and the development of call handling processes and scripts.
  - c) Work will be done at both the corporate and departmental levels to develop Customer Service standards and Key Performance Indicators. These standards and Key Performance Indicators will be integrated into future performance plans.
  - d) The after-hours call plan has been positioned as a high priority for 2015 and significant work will be done to design new processes for handling after-hours non-911 emergency calls.
  - e) Opportunities to align the Customer Service Plan and the Open for Business Initiative will be explored. Working closely with the business community to provide an improved customer experience will be a priority.
20. 2016 Phase
- a) It is anticipated that the focus of the Customer Service Plan for 2016 will be the opening of the City Hall Contact Centre. This will have a significant impact on the way we do business and how we are viewed by our customers. It is anticipated that full phase-in of the Contact Centre will include the various customer contact channels such as phone, email, counter, web chat, social media, and SMS (texting). Services will be phased-in with the goal of prioritizing high demand services first (i.e. transit, recreation, environmental services and roads, parks and fleet.) The success of the Contact Centre will be tied to the implementation of a robust Customer Management and Knowledge Management Solution to ensure customer interactions are



consistently tracked and that Contact Centre staff have ready access to consistent, accurate information.

- b) It is expected that there will be significant opportunities to provide services at the Contact Centre through improvements realized from the ERP, an upgraded Recreation registration system, City Works, and Applications Permits Licenses and Inspections Solutions. These systems will also result in significant improvements to our online services, helping to encourage customers to make greater use of self-serve options thereby putting less pressure on in-person channel option.
- c) Subject to the success of the pilot project for enhancing City services at Holly Community Centre, effort will be put into expanding the pilot project to East Bayfield and Allandale Community Centres. Alignment to the Open for Business initiative will be an ongoing priority.

21. 2017 and beyond

It is anticipated that there will be continued development and introduction of new services and functionality as new systems and processes become available. Once the major projects have developed strong traction throughout the organization we will look to extend into service partnerships with similar organizations i.e. Service Ontario, Library, Police Services.

This is an ambitious plan and other competing projects and initiatives may impact on the proposed timelines. In addition, necessary budget approvals may impact the speed of implementation.

**ENVIRONMENTAL MATTERS**

22. There are no environmental matters related to the recommendation.

**ALTERNATIVES**

23. The following alternatives are available for consideration by General Committee:

**Alternative #1**

General Committee could decide not to adopt the Customer Service Plan in Principle.

This alternative is not recommended as it provides a framework for planning the next several years' worth of customer service improvements. Not having a plan could lead to wasted resources, increased costs as current systems struggle to maintain current service levels and increased frustration of the customer.

**Alternative #2**

General Committee could delay the implementation of the strategy or alter the proposed recommendations for phasing.

Although this alternative is available, delaying implementation would result in a loss of confidence with the public and staff as extensive consultation has raised the profile and expectations of this initiative. The phasing has been determined as a result of extensive review with customers and staff. Council will have the opportunity to adjust phasing when full costing is known as part of the Business Case.

**FINANCIAL**

24. The staff in Access Barrie will prepare a Business Case for the Customer Service Plan as part of the 2015 Business Plan. Full implementation plan(s) for the initiatives identified in the 2015 phase will be presented to Council in 2015. Future implementation costs will be included in subsequent years' business planning processes.
25. The costing estimates associated with the proposed phasing of the Customer Service Plan will be detailed in the City's Business Planning process over the next five years.
26. It is anticipated that operating funds will need to be put aside for Customer Service Implementation through the 2015 business plan. This will allow for dedicated business planning for the individual components to continue. A request for dedicated funding will be put before Council through the presentation of the Business Plan in 2015.
27. It is anticipated that funding will be required for the following areas:
  - a) Operating Funds for 2015 will be required to implement the Customer Service Plan. The resources required for staffing costs, the development and delivery of training, equipment and services that will be fully defined through the business planning process. Where feasible, staffing will be drawn from the existing full-time complement however, it is anticipated that some new staff will be required to provide specific skill sets and to facilitate the transition of services. It is anticipated that as the Call Centre and Contact Centre take on the largest portion of customer contacts in the coming years, there will be some enhanced capacity realized at the departmental level that could be allocated to support department specific activities or be transitioned to the Call/Contact centre. These resources will be better defined through the business planning process.
  - b) Staffing - It is anticipated that dedicated staff will be required to deliver the goals of the Customer Service Plan. With the first phase of projects expected to begin in Q4 of 2015, dedicated staff to plan and prepare for service enhancements will be required as soon as possible to meet these timelines. Anticipated staffing needs include a Content Administrator related to Customer and Knowledge Management and Customer Service Representatives. Detailed staffing needs will be presented for General Committee's consideration through the 2015 Business Plan.

- c) Capital Costs will be further defined through the business planning process. Anticipated areas of expenditure will include computer and communications infrastructure, renovations and equipment. A formal request for spending authorization will be presented to Council through the 2015 business plan.

**LINKAGE TO 2010-2014 COUNCIL STRATEGIC PLAN**

28. The recommendation(s) included in this Staff Report support the following goals identified in the 2010-2014 City Council Strategic Plan:
- Improve and Expand Community Involvement and City Interactions
29. The successful implementation of the Customer Service Strategy will result in significant improvements in service efficiency and quality. The benefits to customers will be specific and measureable. Customers will receive timely, responsive service that's convenient and easy to access, resulting in increased satisfaction levels. The customer experience will be streamlined and consistent regardless of what channel the customer chooses to access. Service will be on the customer's terms for when and how they access services.

**APPENDIX "A"**

**Customer Service Plan**

**IT'S NOT  
JUST ABOUT  
IMPROVING  
THE CITY...**



**IT'S ABOUT A CITY IMPROVING FOR ITS PEOPLE**



# City of Barrie Customer Service Plan

Access Barrie  
September 8, 2014

# Customer Service Plan

Access Barrie

September 8, 2014

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**INTRODUCTION**

One of the City of Barrie's corporate strategic priorities, as identified by Council, is to "Improve and Expand Community Involvement and City Interactions" (Strategic Plan 2010 – 2014). The new Customer Service Plan plays a key role in moving us closer to achieving this priority.

The Customer Service Plan is about raising the bar and taking the City's customer service practices to the next level. By using best-practices, leveraging technology and maximizing existing resources, the City will adopt an innovative approach to customer service that can adapt to the changing needs and expectations of our community, while supporting best business practices.

Customer Service includes any and all City Services (roads, waste, recreation, parks, winter control, finance etc.) that someone wants to request, register for, pay for or get information about. Every time we interact with a resident or business, whether it's in person, by phone or email – that's customer service in action!

What's new is the way that people want this interaction to occur. No longer are in person or on the phone the only options. Increasingly there is a desire to have mobile and online solutions.

What remains the same is that residents & businesses expect access to consistent, reliable, efficient and effective information where, when and how they want it.

Customer expectations are growing as customers now expect options to access public services to match private sector systems and levels. The resulting increases in demand for service cannot be handled by our current systems and processes, particularly given the scope of services delivered by a single tier municipality as compared to a private sector company focused on a single or limited product/service delivery. The Customer Service Plan will help bridge these gaps and allow the City of Barrie to better meet the needs of our growing city now and in the future.

## HOW WAS THE CUSTOMER SERVICE PLAN DEVELOPED?

This plan is the result of extensive consultation, a review of best practices and a thoughtful look at how the City of Barrie can support customer needs through all channels and all services. Our journey towards customer service excellence never ends and this plan will guide our collective efforts for the coming years.

This project started in 2013 in response to Council's identification of customer service as a strategic priority. Through the reorganization that occurred in May 2013 resources were allocated to lead and manage the Customer Service Project. A cross departmental Customer Service Team has been meeting since late November 2013 and has adopted the Executive Management Team (EMT)'s mission for Customer Service:

*To build a customer focused organization responsive to the community where all staff understand and embrace their fundamental role as one of serving the Community.*

The Team undertook the following activities to develop the Customer Service Plan:

### External Review

- Studied the Customer Service models of 13 municipalities including Guelph, Kingston, Brantford, Oakville, Sudbury, Newmarket, Hamilton, County of Simcoe, Ottawa, Chatham-Kent, Halton Region, Ajax and City of Kawartha Lakes.
- Reviewed industry best-practices in both municipal and private sectors.
- Reviewed public feedback obtained through a variety of methods including: the 2013 Citizen Satisfaction Survey, conducted by FORUM Research, which polled 1,000 residents about satisfaction levels with the customer service they received from the City (November 2013); a Customer Experience Survey that was available online and was also conducted in-person at the Parkview Centre Living Well Fair, Celebrate Barrie and at the Holly Community Centre. 428 responses were received (June 2014); a random statistically significant phone survey of 750 residents and 75 businesses conducted by Oracle Poll in July 2014 which queried customer preferences for how they would like to conduct transactions with the City.
- Direct consultation with the Accessibility Committee and Seniors Advisory Committee.

### Internal Review

- Engaged all departments and EMT to form a Mission, Vision and approach for developing the Plan. This included a comprehensive review of current Customer Service standards and practices as well as identifying current needs/challenges and barriers.
- Conducted internal focus groups with 40 front-line customer service staff and 19 Supervisors and Managers.
- Observed front-line customer service staff in action across the corporation to see first-hand the complexity of customers' needs as well as the demands on staff.
- Launched an internal online Customer Service Suggestion Forum to help identify opportunities for improving customer service right away. Employees from across the corporation posted their ideas

on how to improve customer service and voted on suggestions they liked. As of the end of August, there were 59 suggestions and 156 of staff engaged through votes

- Consultation with the Barrie Police to ensure the City's Customer Service approach is in alignment.

## SITUATIONAL ANALYSIS

### What Does Our Community Want?

#### Residents - Current Practices & Future Preferences

- **Current Practices** - More than seven in ten or 71% prefer to use the online approach for making a municipal bill payment. A majority of residents also tend to use online access to book services (59%) and request information (57%) followed next by submitting applications (50%). Most or 66% prefer the telephone option for reporting. The in-person or at-counter method has its highest usage (43%) for application submissions.
- **Future Preferences** - When asked how they would prefer to conduct municipal transactions in the future, the online approach was the most named method, especially for bill payments (70%). The exception to this was incident reporting where 64% favour phone contact. The online method has its highest resonance among 18-34 year olds as well as newer residents of the City, while older citizens 65 and older tend to prefer the in person or telephone method of transaction.
- **Potential Enhancements** – When asked to rate the importance of potential Customer Service enhancements that the City of Barrie is considering, the highest rated in terms of importance were for having an enhanced website for service access (63%) and one telephone number for contact with the City (63%). There was moderate importance expressed for a one stop counter at City Hall (54%) and for enhanced services at Community Centres (44%), while the lowest importance (30%) was given for having extended City Hall hours of operation.

For full survey results please see Appendix "B"

#### Businesses - Current Practices & Future Preferences

- **Current Practices** - The online method was the most preferred option among businesses when it came to requesting information (81%) and booking a service (78%), while most or 88% favor using the telephone to report an incident. Respondents were divided on methods when it came to making payments (47% online & 37% at counter) and submitting applications (48% online & 52% at counter) between the use of online and at counter service.
- **Future Preferences** - The online option was the most favoured method for submitting applications (61%), followed by request information (56%) and make a payment (52%). Telephone contact is seen as the best way to report incidents (56%), followed next as a way to request information (31%) and book services (28%).
- **Potential Enhancements** – When asked to rate the importance of potential Customer Service enhancements that the City of Barrie is considering, the highest rated in terms of importance (somewhat & very) were for having a one-stop counter at City Hall (64%), one telephone number (64%) and for an enhanced website (60%). There was moderate importance and higher



unimportance expressed for enhanced service at Community Centres and for extended hours of operation at City Hall.

For full survey results please see Appendix "C"

### What Are Our Peers Doing?

- All of the 13 municipalities studied have, or are moving towards, integrated **one-stop service counters** offering a full range of municipal services accessible through multiple channels – counter, phone and email. Most front counters serve as the single financial transaction point for the majority of departments and services.
- **Central contact** – In addition to the one-stop service counters, most municipalities also provide one central contact (i.e. one phone number, one email address) as the first point of contact to access City services. The majority of phone services use an initial automated attendant for callers followed by live answer as the next option.
- Some offer **expanded services** at locations outside of City Hall such as **libraries, recreation centres** etc.
- Some municipalities offer **extended hours**, but the norm is Monday to Friday from 8:30am to 4:30pm.
- **After-hours calls** - The majority of municipalities use a third party after-hours call service to handle non-911 emergency calls and basic informational inquiries received outside of regular business hours.
- **Online services** - All municipalities are looking to improve/enhance access to online services and increase online service transactions. Governments at all levels are trying to actively migrate customers to self-serve channels in response to customer expectations, efficiency and cost avoidance. Common online services include:
  - Comprehensive online service directories
  - Resident and business portals to enable residents and businesses to manage and track their City interactions through one web profile.
  - Single email contact for the municipality
  - Increased ability to register, pay and apply for services
  - Web design features that include "report a problem", "I would like to" and improved search functions.
  - New channels of contact are emerging through social media, mobile apps and web chat features.
- **Customer tracking** – Measuring the success of the models has been highly dependent upon the ability to consistently track, measure, and report on customer interactions through the use of Customer Management systems. These systems also make it easier to provide up-to-date, accurate information to customers in multiple formats as the databases used for tracking also

contain frequently asked questions and answers. These systems use computer software applications to manage all aspects of customer interactions within an organization including collecting, storing and analyzing customer information. Having a robust Customer Management system allows tracking, measuring and reporting on customer interactions across all business units. This enables the ability to spot and track emerging trends, issues or areas of interests. This information can be used to produce ward or subject matter reports to allow staff to be proactive and plan for mitigation.

- **Partnership models** with Service Ontario and Service Canada are emerging opportunities being explored once a centralized Contact Centre has been established.

For full chart of review please see Appendix "D"

### **Where Does the City of Barrie Stand?**

Internal consultation with department management groups and front line staff across the Corporation yielded the following;

#### **STRENGTHS**

Across the Corporation there is a strong focus on customer service and recognition of its importance. Employees are knowledgeable, aspire to high standards, work hard and actively look to be innovative where possible. Customer service improvements are already underway across the City and include:

- The launch of the City's free mobile app, PingStreet, which allows users to access City information and communicate with the City anywhere, anytime through their mobile devices.
- The Downtown & Waterfront Ambassador Pilot Program, which provided residents and visitors with key information (parking, events, directions etc.) to help them enjoy Barrie's downtown & waterfront.
- Enhanced services offered at community centres (Waterfront passes and recycling & organics containers).
- The ability for customers to leave voicemails after-hours.
- Redesigned customer areas on the first floor of City Hall with enhanced directional signage.
- Front-line Legislated & Court Services staff are now equipped to do commissioning, saving customers an extra trip as they don't have to come back to see a Justice of the Peace.
- ROWA employees are moving to the first floor at the Operations Centre to provide greater access for customers.
- The Open for Business Initiative continues to focus on improving processes and reducing barriers to doing business in Barrie to better serve the business community.

#### **WEAKNESSES/ OPPORTUNITIES**

##### **Decentralized Customer Service**

City of Barrie customers are currently accessing services at too many points. There is confusion about how to best access services so customers often try any and all options available to them simultaneously. Customers are required to know the internal structure of the City in order to reach the department that can complete their request and each department is equipped to provide customer service along its specific area of responsibility alone. As a result, customers are not clear on where and how to contact us for the more than 60 services the City provides. There are too many instances where customers are

transferred to multiple people before finding the person that can address their concerns which leads to significant frustration.

**Key concerns include:**

- 40+ different phone numbers for the City of Barrie requiring the public to know which number will allow them to access the specific service desired, or requiring transfers between departments, not easily facilitated with the out of date telephone system.
- 30+ counter service areas where each department is responsible for providing all aspects of service delivery – however, they are generally only focused/able to respond to their own department/branch specific inquiries.
- Social media as a customer service channel - Customers are already using social media as a channel and it is growing. Policies and resources are not currently in place to manage this effectively at either the corporate or departmental level.

***City of Barrie Service Highlights 2013***

- 1 million phone calls received\*
- 2 million visits to recreation centres\*
- 7 million social media impressions
- 8.5 million web hits
- 4259 Customer Service Requests processed through City Works
- 37,951 Recreation class registrations
- 25200 transactions at Finance counter
- 10,000+ permits, licenses applications and requests through various departments\*
- 51010 online transactions (+ 25,896 recreation registrations)

*\*estimates*

**Outdated Customer Service Systems**

There is a heavy reliance on manual systems that reduce efficiency and do not reflect best business practices. There are also existing customer service systems and processes that need to be updated. One example is the City's current telephone system, which does not provide the flexibility to route calls effectively or track performance. Technology updates through existing projects such as ERP, Class, City Works, Applications Permits Licenses and Inspections Solution will bridge some of these gaps. These projects combined with enhancing self-serve systems including online applications and through kiosks in high traffic areas, as well as building on our existing mobile and e-services applications, will be major opportunities to move the Customer Service Plan forward.

**Website: An Information Source & Service Provider**

**An Information Source - *Barrie.ca*** is a highly used channel for information, and houses a vast amount of content. In 2013, there were over 8.4 million views on *barrie.ca*. Regular maintenance of the site content requires significant attention and resources to ensure its value to residents and customers.

Inaccurate, outdated content has two primary negative effects:

1. It leads to an increase in phone calls and/or visits to City staff (often from frustrated residents) for answers to frequently asked questions. This reduces the amount of time employees have to address more complex customer issues that cannot be answered through the web.
2. It creates a negative image of the entire corporation. Web visitors' attitudes towards City staff and Council are negatively impacted when they encounter outdated or inaccurate information on *barrie.ca*.

It is currently the responsibility of all staff to be aware of information that should be available to residents via *Barrie.ca*, and to work with designated departmental content contributors to ensure this information is

current. This model encourages corporate diffusion of responsibility that often results in inaccurate, outdated content. Past customer service protocols prioritized in-person and phone transactions over online transactions, which combined with limited resources in many departments, has contributed to less focus on on-line information. Establishing *barrie.ca* as a priority for the allocation of resources will be required to enhance customer service at the City.

**Online Services** - The City currently offers three online services where customers can maintain a personal profile for: paying parking tickets, applying for fire burning permits, and pet licenses. Recreation services are housed under a separate profile. Additional online services, housed across various web forms/sites, do not sync to customers' personal profiles at all ([barrie.ca/OnlineServices](http://barrie.ca/OnlineServices))

Centralizing all services under one web profile where residents and business owners can complete/track all City interactions and service requests would improve the customer experience. Increasing and encouraging self-serve opportunities will help:

- reduce customer reliance and expectations of other channels
- improve customers' overall satisfaction level
- increase engagement and revenues across multiple streams

### **After-Hours Phone Services**

Non-911 emergency after-hours calls are currently managed by Barrie Fire and Emergency Service (BFES) dispatch staff. BFES provides this service while simultaneously being responsible for fire and emergency dispatch to 16 municipalities in addition to their own calls. During significant events such as storms or major emergencies there is insufficient capacity to meet the demands of non-emergency calls. Additionally, BFES has received requests to supply emergency dispatch services to other municipalities but cannot enter into these new agreements due to current limitations, which include the after-hours service.

### **Customer Tracking**

Currently, there is no consistent method of tracking customer interactions across the City. In some cases this makes it difficult to follow-up on the outcomes of some customer interactions to confirm whether the issue was resolved or if it is part of a trend. Current tracking methods vary across departments and include manually entering data into spreadsheets, tracking phone statistics, monitoring various database measures, work orders and surveys. There is a corporate need for a consistent tracking method across all business areas to measure progress/satisfaction levels, monitor trends (seasonal shifts etc.), and better manage resources. The current lack of consistent tracking makes it impossible to establish benchmarks or identify service improvements. Effective tracking would allow for regular generation of top 5 issues by ward or service or other determined indicators. This would allow for proactive handling of sensitive issues. Additionally, there is an increased risk of staff duplicating efforts without consistent systems to track and follow up on the status/outcome of customer interactions.

### **Knowledge Management**

**Access to information** – Currently there is confusion about where and how to access up-to-date, accurate information. The website and intranet are not updated consistently by all departments, which leads to general confusion about whether information is reliable/accurate. It is a challenge to keep staff up-to-date with the number of changes occurring across the corporation. Having a central point of reference through a knowledge management solution, to house the most current information, processes

and key contacts with dedicated staff updating the information would allow staff to respond to customers more efficiently.

**Consistent Messaging** – Providing consistent messaging to customers, regardless of where or how they access services is currently a challenge due to the high-volume of requests, rate of change and the difficulty in managing consistent cross-departmental messaging when customers must access several departments to complete one process. For example, applying for a business licence could include visits to Building Services on the 8<sup>th</sup> floor, By-law Services at 45 Cedar Pointe Drive, Zoning on the 1<sup>st</sup> floor in Planning, Barrie Fire and Emergency Service at Dunlop Street, and Legislative & Court Services on the 1<sup>st</sup> floor (if a liquor licence is involved only). Having a centralized knowledge management solution where common processes (i.e. applying for a business licence) and messaging could be documented and made accessible to all staff would ensure customers receive consistent information regardless of who they speak with.

### **Customer Service Training**

General Customer Service training has been done with the majority of staff in response to ensuring compliance with AODA legislation. As the corporation shines a stronger spotlight on customer service there is a strong desire for consistent access to a more comprehensive list of customer service training opportunities (customer specific modules, cross departmental format). Current training is generic and doesn't take into account the varied situations dealt with by employees. Customer expectations/attitudes as well as the training required to handle situations are very different for someone paying for a ticket versus someone registering for a swimming lesson.

## **CHALLENGES**

### **Tools & Resources**

The City has implemented a new portfolio governance process to improve decision making in project prioritization, ensuring that the right projects are completed at the right time. Through this process, concerted efforts are being made to ensure projects are corporately aligned with sufficient resourcing from both a scheduling, funding and people perspective. With process improvements and technology identified as significant contributors in improving customer service, the City will need to dedicate resources from across the corporation to achieve the anticipated results. These dedicated resources will be competing with resource allocations already assigned to the ERP project and other large corporate initiatives.

Additionally, with the current volume of business expected to increase as the City continues to grow, resources across the corporation will be stretched and limited. As staff workloads increase there is a move within departments towards assigning staff to one specific area or service. This increases the City's already decentralized service model.

### **Growth and Resources**

Under the Provincial Growth Plan, the City of Barrie will grow to 210,000 people and 101,000 jobs over a 20 year planning period from 2011 to 2031. Our current service delivery processes will not be able to manage the expected increases in requests for service from our customers.

For example, in 2013 our Roads, Parks and Fleet staff processed 3,800 service requests. By the end of June 2014 that annual total had already been exceeded. This scenario is expected to be repeated in several service areas. With the increase in demand, customers are being required to wait in longer lines

or on hold for service. This leads to frustrated customers who will try multiple channels (different phone numbers, email, call their Councillor or the Mayor etc.) to try and resolve their issue. This often results in multiple staff members all working on the same thing at the same time and/or these every day service requests are escalated to Council and upper management unnecessarily – simply because residents don't know where else to turn. Increased customer frustration decreases customer trust and perception of value for the services that the City of Barrie provides. Without significant changes to our customer service model this will continue to escalate and outpace City resources.

### **Legislation**

Service delivery in certain areas, such as Legislated and Court Services, Finance and Environmental Services, may be impacted by provincial legislation or established procedures which can prohibit and/or limit the City's ability to fully utilize new systems that will enhance the customer experience. Additionally, new and increasing legislative requirements from higher levels of government could constrain our ability to grow customer service.

### **Contracts**

Other potential challenges include union contract limitations and major third party contracts such as transit and waste where the customer service standards may be contract defined to varying extents and not managed or controlled specifically by City staff. Negotiations will be conducted to align with our new Customer Service standards and guidelines.

## THE CUSTOMER SERVICE PLAN

The vision for customer service is to enhance the customer service experience by providing efficient, accessible, consistent service and by treating everyone – customers and employees – with respect.

Our Mission:

*“To build a customer focused organization responsive to the community where all staff understand and embrace their fundamental role as one of serving the Community”*

**The Plan is built upon the following Key Values;**

- Knowledge – we will ensure that staff has the skills, tools and information required to provide accurate and excellent customer service.
- Respect – we will treat all customers with dignity, fairness and professionalism using an efficient, consistent and effective approach.
- Timely – we will respond to customer needs in a coordinated and prompt fashion.
- Accessible – we will provide services in a manner that is easy to use and meets our customers’ needs.
- Adaptable – we will use customer feedback to measure and improve work processes and implement innovative ideas to respond to changing customer expectations.

### GOALS

- Enhance Customer Services access options
- Create a Customer Centred Culture that responds to the needs of our Customers
- Update and enhance Corporate Customer Service Guidelines
- Provide easily retrievable information for staff when responding to customers
- Provide technology solutions to monitor, track and analyze customer interactions and measure satisfaction levels

#### GOAL: ENHANCE CUSTOMER SERVICE ACCESS OPTIONS

Moving from decentralized departmental based customer service to a centralized service that provides a single point of contact at City Hall where customers can access multiple services, with systematic tracking, clear service standards and dedicated resources will ensure customers receive the consistent, efficient and accessible service they expect.

**We will...**

**Create a Call Centre that merges 40+ existing City of Barrie phone numbers into ONE number** that customers can call to access most City services. By calling 705-726-4242, customers will have the option of dialing a known name or extension or they will go to a live answer system where a customer service representative will be able to serve them immediately or transfer them to the correct person the first time.

Customers will no longer try and guess which phone number they should be calling to access the service they need. This option has the highest priority for the plan with the most opportunity to effect immediate change for the largest number of customers based on the results of the external surveys.

- **After-hours calls;** an alternative delivery will be planned to handle non-911 emergency calls and the associated service requests to on-call staff. This will relieve current capacity issues created by having BFES dispatch provide this service and will ensure that callers will be directed to the appropriate after hours alternatives for the services they are trying to access.
- **Timing:** Subject to 2015 budget approval, it is anticipated that the project will begin in 2015 with a phased approach to reducing the number of lines by 50% in 2015 and completing the transition in 2016.

**We will...**

**Enhance *Barrie.ca* and the number of online services.** Customers will have access to more self-serve options through the website, mobile applications, social media and the introduction of additional communication channels as appropriate.

Information about City services will be accessible via keywords that are familiar to the average customer. Website features will include:

- Activity-based navigation for service: *"I would like to..."*
- Report-a-problem functionality
- Customer satisfaction tools (i.e. surveys, rankings and ways to contact staff)
- Enhanced registration for programs and services
- Enhanced opportunities for payment of tickets and fees
- Online forms for licences and permits
- Resident and Business portals which will allow individuals to track all of their interactions with the City
- Interactive system for requesting service and assistance, with the ability to track progress of requests
- Purchase of City products (i.e. maps, merchandise, tickets for events)

*New services/opportunities will be developed and added through ongoing improvement initiatives.*

**Timing:** It is anticipated that the project will begin implementation in 2015 with a phased approach.

**We will...**

**Provide a "One Stop Experience"** through the creation of a **Customer Contact Centre**, where most general City of Barrie services already offered at City Hall would be available by visiting ONE Counter location. Located on the first floor of City Hall, the Customer Contact Centre will be the first point of contact for visitors, phone calls, email and social media requests for most City services. Customers will be able to pay for, inquire about, apply for, register for or tell us about City programs and services.

Dedicated customer service staff will be cross trained to work in all channels – phone, counter and digital platforms (email, social media, web chat etc) – and to deal with basic service requests at first contact. Staff will no longer spend time re-directing customers who accidentally arrive at the wrong counter or telephone extension. Customer service staff will also ensure that information online is accurate and up-to-date.



- Services will be transitioned to the Customer Contact Centre in a phased approach. Once full phase-in of services has occurred, customers will be able to complete 80% of general transactions, including payments, within their first contact or be redirected to the right person – the first time.
- The creation of a Customer Contact Centre at City Hall is not expected to replace existing counters, as they will continue to exist to support specialized service delivery, and serve as reception into the departments.
- Extended hours of service in the evening and/or Saturday mornings during the farmers market will be considered as demand for service warrants.
- **Email** – The Customer Contact Centre will be the first point of contact for managing customer request emails and will meet the standard of first contact resolution. As with other channels, if expert or specialist support is required, customers will be referred accordingly. This initiative will be tied to the development of the Call Centre in 2015.
- **Social Media** – All social media customer service issues will be handled by customer service staff in the Contact Centre. Social media will be a regular channel to deliver, monitor and track customer service issues and concerns. Staff will be specifically trained and assigned to monitor & respond to specific customer inquiries and proactively deliver content during all hours of operation. This initiative will be tied to the development of the Call Centre in 2015.
- **Mobile Applications** – Emphasis will be placed on leveraging existing mobile applications (PingStreet). Opportunities for using new applications will be reviewed through the Web Steering Committee. Focusing on transit, environmental services, roads parks and fleet and recreation will have the greatest impact on our customers, as identified in the 2013 Citizen Satisfaction Survey.
- **Additional Channels** – Texting has become one of the most popular forms of communication, and will be introduced as an additional way to communicate directly with customers. Unlike traditional methods, texting does not require waiting on hold or in line to speak to the right person. Web Chat is another customer service tool that will be explored to enhance the customer experience. Web Chat typically has the highest level of customer satisfaction, as well as the lowest effort. These initiatives will be tied to the development of the Customer Contact Centre in 2016.
- **Timing:** This initiative is dependent upon facility design and staff relocation plans currently underway. It is anticipated that the project will begin implementation in 2016 with a phased approach to providing services for the various departments.

#### **We will...**

**Provide enhanced City of Barrie services at Community Centres** - With over 1.9million visits to City of Barrie community centres in 2013, there is a significant opportunity to improve customer service at these locations by providing additional City services, such as paying bills, or applying for basic permits. Barrie's community centres represent the closest point of contact with the City for many residents who often ask at these locations for information that is not related to Recreation. While City Hall's current business hours of 8:30am – 4:30pm are limiting to some customers, our community centre's offer extended hours which may be more accessible. With well-established cash handling and business processes already in place, a solid foundation is in place to expand the services offered, and to build on Recreation Services well established culture of good customer service.

Self-serve kiosks will be installed at Community Centres and will provide customers with access to community information, maps and basic bill payments to help improve customer service, while reducing the demands on staff.

**Timing:** It is anticipated that a pilot for this initiative will begin at the Holly Community Centre by the end of 2015. Planning for the pilot project will begin with an assessment of the current technology, human resources, space, and supervisory structure that are in place within Recreation's Client Services desk. This assessment will identify the capacity of these locations to accommodate additional City services, and any additional resources or structural changes which will be required to ensure success.

## **GOAL: CREATE A CUSTOMER CENTRED CULTURE THAT RESPONDS TO THE NEEDS OF OUR CUSTOMERS**

Enhancing the customer experience will require a commitment from all staff. Staff will be empowered to provide customers with service in a friendly, professional, efficient and consistent manner that exceeds expectations.

### **We will.....**

- Develop policies and identify consistent measurements for customer service that reinforce the Plan's common vision and goals.
- Provide ongoing opportunities for both general and specific customer service training that addresses the various types of customer interactions. Identify internal best practices, and ways to share these practices amongst departments.
- Provide staff with the knowledge, tools and resources to provide top level customer service. This will include conducting regular internal focus groups for front line staff across the corporation to share and learn from the experience of their peers.
- Integrate customer service performance metrics into work plans and align projects and activities with the Customer Service Plan to make it part of the day-to-day corporate culture.
- Implement "quick wins" - Through ongoing consultation with Council, staff and customers and existing tools such as the online suggestion forums for both staff and customers, new opportunities will be identified and implemented on an ongoing basis.
- Celebrate Success – In cooperation with Human Resources and the Staff Strategic Plan, a corporate customer service excellence recognition program that rewards employees for their achievements, innovation, commitment and provision of customer service both internally and externally will be developed. Customer Service Week will be celebrated annually with workshops and forums for staff, public displays and awards. The inaugural celebration will be in October of 2014.
- Empower staff to be innovative and make the best use of processes, technology and resources.
- Reduce barriers to change, and encourage continuous improvement in customer service delivery.
- Ensure customer service is a core competency for all employees and included as part of the recruitment and hiring plan.
- Aim to provide exceptional customer service to all, ensuring we reflect the diversity of the community and meet or exceed AODA legislation for inclusion and accessibility.

## **GOAL: UPDATE AND ENHANCE CORPORATE CUSTOMER SERVICE GUIDELINES**

With the diversity of customers that access service, a one size fits all approach to Service Delivery Standards is impractical. Departments know their business, their customers and what drives their satisfaction. Service Delivery Standards will be developed by departments for all services which are consistent with the overall objectives of the corporate guidelines for values and expectations. The expectations will be refined and expanded upon in the coming year.

### **We will...**

- Update standards and protocols to reflect all access channels (phone, email, counters, mobile applications, social media and online opportunities).
- Develop and publish service level expectations so the customer will understand the timelines associated with their service request for each department.
- Develop communication protocols to ensure we respond to our customers consistently across all channels (in-person, phone, online).
- Ensure consistency of process and timing with similar services across the corporation and across the various channels offered.
- Provide ready access to a live person as an option with our phone channels.
- Develop systems to easily update customers on the progress or status of lengthy inquiries, requests or transactions.
- Develop a formal complaints resolution process.
- Develop policy provisions to address frivolous and vexatious customer interactions.

## **GOAL: PROVIDE EASILY RETRIEVABLE INFORMATION FOR STAFF WHEN RESPONDING TO CUSTOMERS**

Access to accurate, up-to-date information is essential in order for staff to provide effective customer service.

### **We will...**

- Develop a knowledge management solution for staff with increased use of the website and InSite as an informational resource to provide all staff with consistent access to accurate, up-to-date information. Ensuring processes are in place to consistently maintain and update the information housed on these systems will be critical.
- Develop and maintain a quick list of department based frequently asked questions to assist staff in all areas to provide easily retrievable answers to common customer questions.
- Increase opportunities for cross departmental interactions through training and transaction based focus groups. The cross pollination of ideas and practices through direct interaction will lead to best practices being followed across the corporation.

## **GOAL: PROVIDE TECHNOLOGY SOLUTIONS TO MONITOR, TRACK AND ANALYZE CUSTOMER INTERACTIONS AND MEASURE SATISFACTION LEVELS**

Customers will have confidence that their interactions are tracked and held to a standard of accountability to established service standards. Staff will be able to use technology to track and manage those interactions with the aim to improve process and procedure from a customer facing perspective.

### **We will...**

#### **Invest in a corporate wide Customer Management and Knowledge Management Solutions.**

Customer Management solutions allow for the tracking of individual or groups of requests so that the history and status of work orders is readily available and quickly communicated to the customer. This is facilitated with processes and technologies that capture customer interactions, organizes information and automates processes to enhance customer service. This provides employees and management with information and tools to better meet customer needs.

A centralized Customer Management Solution will allow Customers to:

- Avoid having to repeat their stories as interactions will be documented along with any follow up.
- Have a consistent customer experience as all staff will have easy access to reliable, accurate, up-to-date information.
- Have their concerns and requests dealt with effectively and efficiently as the history and status of customers interactions will be easily retrievable to staff.

A centralized Customer Management Solution will allow Staff to:

- Track the volume, type and resolution of all inquiries from all channels. The tracking can be used to identify trends and emerging issues city wide or ward/neighbourhood specific.
- View open and closed service requests for benchmarking and defining of actual service standards so resources and work plans can be better aligned.
- Support a knowledge base to capture department processes and procedures to better serve the customers consistently, and maximize first contact resolution.
- Provide reports to departments, EMT and Council regarding inquiries and service requests. This will allow the City to identify trends, highlight changing needs related to resources and measure its performance against defined standards. This will support better business planning.

Using a phased approach the emphasis initially will be on contact tracking and development of the knowledge systems to increase the level of efficiency, effectiveness and consistency across the organization.

The solution should fully integrate with the City's existing and future enterprise applications and technology platforms. It would also integrate with external partner systems to ensure that any flow of requests initiated at the partner intake channel is consistent with those generated through City processes. For example our Transit and Waste operations partners who deal with direct service delivery and complaints resolution will have common reporting mechanisms and tools to ensure that the experience will be seamless for our customers regardless of which service they are accessing. Complete requirements for the solution will be defined as business processes are further developed.

**We will...**

**Investigate phone systems** looking to identify the functionality required to implement initial Call Centre (phones number consolidation) start up in 2015 and transitioning to a Contact Centre (handling all channels of 1<sup>st</sup> contact including phones, email, counter, social media, online and mobile solutions) in later phases. Needs identification will determine the requirements for new technology solutions.

**Improve Self-Serve Opportunities** by exploring existing, new and emerging technologies that could be used as additional or replacement channels of access. This could include web chats, new social media platforms etc.

**Develop Resident and Business Online Portal Functionality** to enable residents and businesses to manage and track their City interactions through one web profile. Customers will be able to see what they have purchased, applied for, submitted a service request for, and what the status of those requests and applications are.

## **PUTTING THE PLAN IN MOTION**

The Customer Service Plan will be implemented in phases as resources and capacity is realized. It will constantly evolve over the next 5 years. Leadership and a shared organizational commitment will be essential for success. Dedicated resources will be needed to implement the initiatives that are part of this plan. Successful implementation will require a major time commitment from staff and departments to develop new processes to support the new service delivery model.

Effectiveness cannot be achieved solely through centralization. In order for integrated service delivery to be successful, extensive business process review must take place. The goal will be to reduce turn-around time and improve responsiveness. Opportunities for improvements will be sought so that the front-line customer service staff can give quality referrals into clearly defined processes and workflows.

Access Barrie will develop, lead and implement the Customer Service Plan, but all departments will have the mandate to make customer service a priority. Access Barrie will work with departments to define and document their customer service processes so that a consistency of delivery can be achieved across services and channels of service. As enhanced services are offered in various formats, Access Barrie will support and facilitate change.

Immediate gains will be realized through regular review of processes and procedures to capture and action "quick win" opportunities.

### **Customer Service Plan Phasing**

#### **2014**

Subject to Council's endorsement of the Customer Service Plan, the balance of 2014 will be used to begin assessing the resource requirements and to prepare and develop detailed business and implementation plans. The planning process will include the development of dedicated cross departmental teams to assess current resource, capacity and limitation, and to determine the best plan for implementing individual projects. Consideration will be given to capacity within departments, changes to work plans and duties, and the associated costs of the various plans.

Customer Service week will be celebrated the first week of October and each subsequent year. Plans will be made to highlight existing customer service successes and raise awareness about the overall Customer Service Plan. To maintain momentum of the Customer Service Plan, effort will be put into implementing "quick wins" that will enhance the customer experience.

#### **2015**

The staff in Access Barrie will prepare a business case for consideration as part of the 2015 Business Plan. Implementation plan(s) associated with the 2015 phase initiatives contained within the Customer Service Plan will be brought before Council for approval in 2015. Subject to approval, plans will be implemented for the phased Call Centre start-up to direct customers to one number to access service; building and populating the Knowledge Management Solution to provide a consistent source for staff to access the most current information; improving the website and online services to provide more self-serve opportunities; and the pilot project for enhancing access to some City services at Holly Community Centre. This phase will include development of Customer Management Solutions to implement effective customer tracking, planning for space allocations and the development of consistent call handling processes and scripts.

Work will be done at both the corporate and departmental levels to develop Customer Service standards and Key Performance Indicators. These standards and Key Performance Indicators will be integrated into future performance plans.

Staffing solutions will be developed which will include the development of job descriptions, transition plans, the implementation of recruiting for initial staff, and developing and delivering training.

The after-hours call plan has been positioned as a high priority for 2015 and significant work will be done to design new processes for handling after-hours non-911 emergency calls.

Opportunities to align the Customer Service Plan and the Open for Business Initiative will be explored. Working closely with the business community to provide an improved customer experience will be a priority.

## **2016**

It is anticipated that the focus of the Customer Service Plan for 2016 will be the opening of the City Hall centralized Contact Centre. This will have a significant impact on the way we do business and how we are viewed by our customers. It is anticipated that full phase-in of the Contact Centre will include the various customer contact channels such as phone, email, counter, web chat, social media, and SMS (texting). Services will be phased-in looking to prioritize our high demand services first (i.e. transit, recreation, environmental services and roads, parks and fleet.) The success of the Contact Centre will be tied to the implementation of a robust Customer Management and Knowledge Management Solution to ensure customer interactions are consistently tracked and that Contact Centre staff have ready access to consistent, accurate information.

It is expected that there will be significant opportunities for services at the Contact Centre through improvements from the ERP, an upgraded Recreation registration system, City Works, Applications Permits Licenses and Inspections Solutions. These solutions will also result in significant improvements to our online services, helping to encourage customers to make greater use of our self-serve options thereby putting less pressure on our in-person (most expensive) channel option.

Subject to the success of the pilot project for enhancing City services at Holly Community Centre, effort will be put into expanding the pilot project to East Bayfield & Allandale Community Centres. Alignment to the Open for Business initiative will be an ongoing priority.

## **2017 and beyond**

It is anticipated that there will be continued development and introduction of new services and functionality as new systems and processes become available. Once the major projects have developed strong traction throughout the organization we will look to extend into service partnerships with similar organizations i.e. Service Ontario, Library, Police Services.

## Financial Implications

With implementation of the ERP project moved to 2016, the Applications, Permits, Licences and Inspection project in 2015, and the expected department physical moves anticipated in 2015 and 2016, with the opening of the Collier St – Mady Development, there are many moving pieces that will impact the Customer Service Plan in the coming years.

The costing estimates associated with the proposed phasing of the Customer Service Plan will be detailed in the City's Business Planning process over the next five years based on the high level business plan for Customer Service that will be presented to Council in early 2015. This current costing model will be based on using existing resources where possible and addressing efficiencies achieved through natural attrition.

It is anticipated that operating funds will be needed to be put aside for Customer Service Implementation through the 2015 business plan. This will allow for dedicated business planning for the individual components of the Customer Service Plan to continue. A request for dedicated funding will be put before Council through the presentation of business plans in 2015.

It is anticipated that funding will be required for the following areas:

Operating Funds for 2015 will be required to begin implementing the Customer Service Plan. The resources required for staffing, the development and delivery of training, equipment and services that will be required, will be fully defined through the business planning process. Where feasible, staffing will be drawn from the existing full-time complement however, it is anticipated that some new staff will be required to provide specific skill sets. It is anticipated that as the Call Centre and Contact Centre take on the largest portion of customer contacts in the coming years, there will be some enhanced capacity realized at the departmental level that could be allocated to support department specific activities or be transitioned to the Call/Contact centre. These resources will be better defined through the business planning process.

Staffing - It is anticipated that dedicated staff will be required to deliver the goals of the Customer Service Plan. With the first phase of projects expected to begin in Q4 of 2015, dedicated staff to plan and prepare for service enhancements will be required as soon as possible to meet these timelines. Anticipated staffing needs will include a Content Administrator related to Customer and Knowledge Management and Customer Service Representatives. Detailed staffing needs will be presented through the 2015 Business Plan.

Additional resources may be needed in 2015 and beyond from across the Corporation to support the following activities:

- 1. Create a Call Centre that merges 40+ existing City of Barrie phone numbers into ONE number**
  - Communications system changes to support call system functionality.
  - Development of call handling procedures in conjunction with affected departments.
  - Development and Training of Call Centre Staff
  - Operating costs for training courses, supplies etc. for staff
  - Facilities and space design and renovations
  - Communications and media to inform staff and public of enhancements and changes i.e. print ads, radio ads, online ads, banners and displays, inserts. Communication will also be used to inform residents of their best options for access to the various services channels.



**2. Provide a Centralized Contact Centre for Service at City Hall.**

- Planning and preparation for the physical space, training and Customer Management and Knowledge Management Solution solutions will be ongoing through 2015. No additional costs outside of those associated with Call Centre start-up are anticipated in 2015. This priority is dependent upon receiving approval for the dedicated Call Centre staff in 2015.

**3. Provide enhanced City of Barrie services at local Community Centres**

- An assessment of existing resources, including technology, human resources, space and management structures will be undertaken. This will include identifying the capacity for additional services that could be offered at the Holly Community Centre and the additional resources or changes that will be required to ensure success.
- Kiosk pilot - development and setup to extend access to our online services as well as add additional services specifically aimed at out of town visitors (i.e. directions, location of various services, restaurant, shopping links etc.)

**4. Implement Customer Service “quick wins”**

- Funds to be allocated to action “quick wins”. Funds will cover one-time costs for items that will show immediate effect. This may include items such as improved signage, development of customer satisfaction tools, promotional opportunities etc.

**5. Creating a Customer Centred Culture**

- Targeted training for staff specific to type of customer and type of interaction.
- Celebrate Success - in conjunction with HR develop a recognition program to acknowledge excellence in customer service.
- Customer Service Week - Special training opportunities with guest speakers.

**Capital Costs** will be further defined through the business planning process. Anticipated areas of expenditure will include computer and communications infrastructure, renovations and equipment.

**Performance Measures**

With a permanent full-time Customer Service area, the City will be able to identify service standards and protocols and measure performance to those standards. Key Performance Indicators will be developed as part of the implementation plan and will be reported to Council on a regular basis to communicate our progress towards the objectives of the plan.

## **WHAT DOES SUCCESS LOOK LIKE?**

Successful implementation of the Customer Service Plan will result in significant improvements in service efficiency and quality. The benefits to our customers will be specific and measurable. Customers will receive timely, responsive service that's convenient and easy to access, resulting in increased satisfaction levels. The customer experience will be streamlined and consistent regardless of what channel the customer chooses to access. Our service delivery will be guided by how and when customers want to access these services.

City staff will be engaged and committed to customer service and will have the knowledge, training and mandate to provide exceptional service. Staff will have more rewarding work opportunities, with the ability to broaden and deepen their skills. The centralized customer service model will provide departmental staff with more time to focus on the technical aspects of their jobs, as less time will be spent dealing with customer service issues. Specialized customer service staff will have the tools and resources to satisfy customer expectations, corporate accountability and legislated requirements.

Management will be able to measure the volume, type and status of all customer interactions. This will provide quantitative support for the budgeting process, resulting in more effective resource management. Council, management and staff will have the ability to monitor the status of service requests and determine whether service standards are being met. It is anticipated that there will be a decrease in the escalation of service requests to Councillors and senior staff.

Both Council and staff will be able to direct resident inquiries to a single point of contact through the Customer Contact Centre and be confident that the issue will be dealt with upon first contact the majority of the time.