



Town of Halton Hills

RFP #P-077-22: Service Delivery Review and Customer Service Strategy

Customer Service Strategy Report

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1.0 Executive Summary

1.1 Document Introduction & Purpose

Building on insights uncovered within the Service Delivery Review, this report is structured to define the **future-looking vision for the Towns operating model, technology requirements and performance measurements** in support of more efficient and modernized service delivery. The objective is to equip the Council and Senior Administration with a clear service framework and roadmap to guide the Customer Service Strategy and to identify technology and operational improvements aligned to the successful transformation.

At the onset of the project, the following project objectives were set:

1. Identification and setting of service standards, including assessment against current metrics where available or developed during service delivery review
2. Catalog of customer related policies to support the town and staff
3. Training and staffing gap analysis and recommendations
4. Digital transformation best practices and consideration of the town's corporate technology strategic plan
5. Facility design and functionality in the context of improved service delivery while considering and/or informing the town hall masterplan.
6. The strategy would need to align with the Town of Halton Hills "Future of Work" portfolio, which includes planning for major community growth and modernizing ways of working, considering physical facility design, use of technology, implementation of customer service standards and achievement of best practices. The Future of Work intends to make use of hybrid ways of working, allowing staff to deliver services via alternative methods, such as remote or virtually. Facility design for service delivery could include the use of interactive spaces for staff to interact with the public other than in person.

Aligned with the project objectives, the following outputs have been identified:

- A. Understanding of how service inquiries / requests can be consolidated to decrease customer points of contact and increase customer satisfaction.
- B. Identified vendors and plan for how to deploy enabling technologies such as CRM.
- C. Plan for expansion of online services to meet the needs of a more diverse population.
- D. Implementation planning of a call and service quality managed environment to assess how well a service has been delivered, improve its quality in the future, identify problems and correct them to increase satisfaction.
- E. Resources to ensure strategic decision-making related to expansion of facilities and delivery of services.
- F. Recommendation of actions to implement a customer service strategy which address culture, service standards, policies, measurement, and performance, and staffing and training.

Based on the above statement, the current document will provide the future-state opportunities and recommendations. The report will explore each opportunity in length, describing the considerations, best practices, and potential course of actions. Many of the report sections have elements which are

interconnected and dependent on key decisions in multiple areas. These key decisions are summarized within the final section 5.0 Governance and Implementation.

Acknowledgement

We would like to take the opportunity to acknowledge the assistance and cooperation provided by staff of the Town of Halton Hills and community stakeholders that participated in the development of the Service Delivery Review and Customer Service Strategy. We appreciate that reviews such as this require a substantial contribution of time and effort on the part of Town employees, and we would be remiss if we did not express our appreciation for the cooperation afforded to us.

1.2 Project Overview

The Town of Halton Hills is looking to continuously improve on how the organization delivers services and engages with customers. To identify targeted areas of improvement, the Town has engaged third-party consultancy CSPN to perform a review. The key outputs of the engagement include a comprehensive 1) Service Delivery Review and 2) Customer Service Strategy Report inclusive of all key findings, analysis, improvement opportunities, recommendations, and implementation planning.

The project outlined two key goals:

- Identify opportunities for increased effectiveness and efficiency in service delivery by conducting a thorough and comprehensive review of services offered by the Town.
- Evaluate and develop a customer service strategy with a corresponding action plan for implementation, including targets, key performance indicators, timelines and milestones, governance model and roles and responsibilities.

This report details a key foundational recommendation to centralize customer service. With the main goal to support more efficient and modernized service delivery, service centralization offers key internal and external benefits:

- Internal benefits: The centralized model will provide a dedicated customer-centric function to provide oversight and maintain customer service standards. It will improve the flow and management of customer requests within the organization through leveraging economies of scale, streamlining customer service tasks, and increasing role and responsibility clarity.
- External benefits: The centralized model provides customers with a one-stop access to municipal services and works to reduce the number of transfers and wait times to provide more timely responses. As the sophistication of the model expands, it will provide greater autonomy to the customer to complete self-serve activities.

More information on the centralized operating model can be found on pages 10-16.

A comprehensive research process was undertaken, which included several internal and external consultations, document reviews, and surveys. An overview of the research is below.

- Existing Document Research – ~105 documents / data files reviewed (16-Jun – 18-Jul)
- Interviews – 21 individual employee interviews - including Mayor (28-Jun – 8-Aug)
- Group Workshops – 22 group employee workshops - including Council (28-Jun – 8-Aug)
- Focus-Groups – 5 customer focus-groups (1-Aug – 15-Aug)

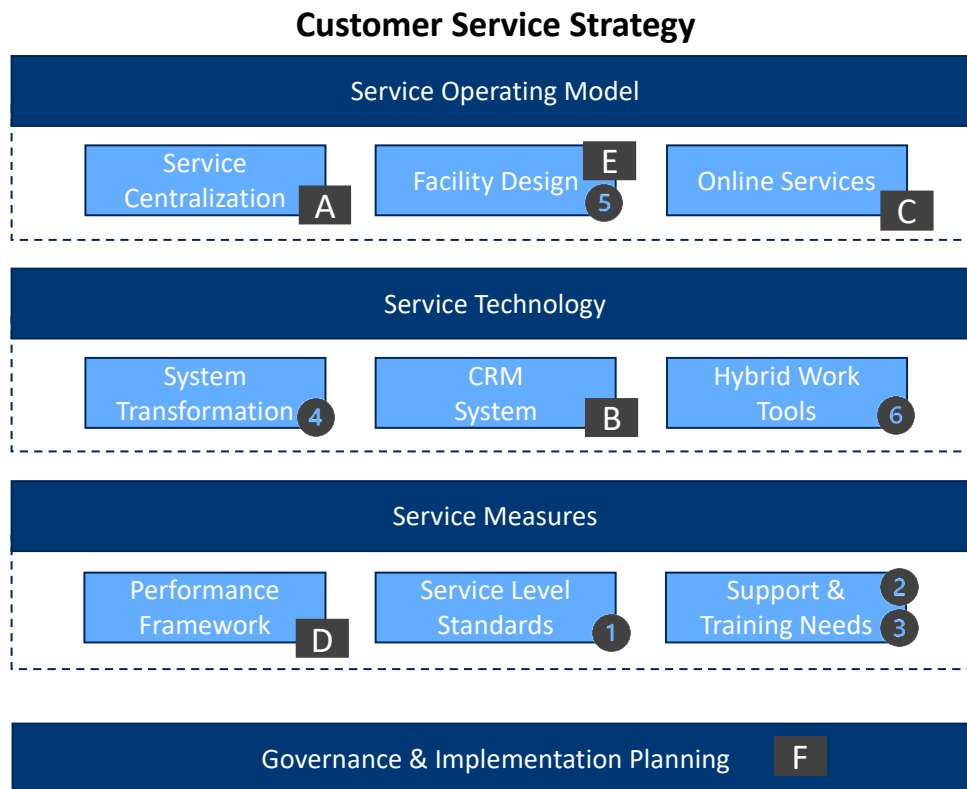
- Feedback Survey - 461 customer responses collected (18-Jul – 22-Aug)

See Appendix I for the Project One Page Summary for more details about the project.

1.3 Report Structure

Aligned to the Project Objectives and the Project Outcomes listed above, the report is structured into four main sections (1) Service Operating Model, (2) Service Technology, (3) Service Measures, and (4) Governance & Implementation Planning. Within each section, sub-sections are identified to address the specific project needs. Each sub-theme is labelled accordingly to align with the list above.

Visual Outline of Report Structure



This report provides a summary of recommendations aligned to each theme and sub-theme. The report includes the following information:

- An overview of findings from the current state to provide context to the recommendations
- The proposed recommendations, including more detailed information
- Alignment of recommendations to findings within the Service Delivery Review
- Implementation considerations to support the successful adoption of the recommendations
- A summary of the benefits of the recommendations

1.4 Recommendations Summary

Aligned to the report structure outlined in section 1.3, the following list is a summary of the Customer Service Strategy recommendations.

A key recommendation for the service transformation is the establishment of a centralized service delivery model. The successful development and execution of this model will be largely dependent on the sub-recommendations within the Service Operating Model and Service Technology categories. This report outlines each of the recommendations in detail in support of the Town's broader vision of delivering services through a centralized and modernized operating model.

Service Operating Model

Objective: *Centralize service across the Town to increase efficiency and effectiveness of service delivery, expand alternative delivery approaches and, standardize and track service levels across the organization.*

Service Centralization Recommendations

- 1A: Design a Centralized Service Delivery Model
- 1B: Develop Department Service Agreements and Process Maps for the Centralized Model
- 1C: Develop Centralization Service Resource Model
- 1D: Integrate Technology Systems Required for a Centralized Service Delivery Model
- 1E: Develop Change Management and Communications Plan

Facility Design Recommendations

- 1F: Design & Build Customer Service Desks to Support the Centralized Model
- 1G: Develop Virtual Consultation Initiative Design and Implementation
- 1H: Develop Self-serve Kiosk Design and Implementation

Online Services Recommendations

- 1I: Expand Online Self-Serve Functionality
- 1J: Develop Customer Online Service Portal

Service Technology

Objective: *Become more efficient and modernized in service delivery through the use of technology, digitization, and alternative working models.*

IT Systems Transformation Recommendations

- 2A: Expand AMANDA System Functionalities
- 2B: Upgrade Mitel Telephony Functionalities to Support Reporting and Analytic Needs
- 2C: Develop an Enterprise Content Management (ECM) Strategy and Tools
- 2D: Redefine Website Architecture

Hybrid Work Tools Recommendations

- 2E: Develop Hybrid Working Model Processes and Procedures

Customer Relationship Management (CRM) Recommendations

- 2F: Determine Customer Relationship Management Solution

Service Measures

Objective: *Define customer service performance measures and service level standards to support a culture and framework of continuous improvement and innovation.*

Performance Measurement Recommendations

- 3A: Develop Customer Service Performance Measurement Framework
- 3B: Develop Data Governance and Performance Measurement

Service Level Standards Recommendations

- 3C: Determine Department Service Levels

Support & Training Needs Recommendations

- 3D: Develop Customer Service Training Framework for Customer Service Roles

1.5 Implementation Summary

The following critical next steps and workplan provides a phased approach to implementing the Customer Service Strategy recommendations. High-level timelines and prioritizations are provided to guide the focus-areas for driving service transformation.

There are immediate next steps that the Town of Halton Hills must execute in-between receiving this report and starting to implement recommendations. This is critical to establish the foundation for success and to effectively manage the long-term implementation of the cumulative recommendations. Immediate next steps are detailed in the chart below.

Critical Next Steps

<p>Review Recommendations</p>	<p>Facilitate an internal review cycle with Project Working Team and key stakeholders to confirm and validate recommendation details. Ensure the review cycle engages all impacted departments or roles to obtain relevant feedback.</p>
<p>Formalize Implementation Governance Structure</p>	<p>Define and formalize the governance team to oversee the implementation of the centralization initiative. Based on the review of the recommendations, the project will have multiple workstreams identified. Select representatives from each impacted department to represent each workstream. Identify review and approval requirements for workstreams and how “success” is defined across workstreams.</p>
<p>Assign Roles and Responsibilities</p>	<p>Assign roles to each workstream and define responsibilities of each role. Identify the in-house capabilities and availability to complete the assignment within the appropriate timeline. If necessary, develop contingency plans or identify outsourced resources that may be required. Ensure that the members accountable for defined responsibilities have the authority and capacity to complete tasks.</p>
<p>Confirm Key Decisions</p>	<p>Engage the governance team and key stakeholders to align on two key decisions that will impact several subsequent recommendations. The Town must first determine the following key decisions:</p>

	<ol style="list-style-type: none">1. Are we going to centralize our service delivery? If so, what is the desire, available investment and feasibility for the maturity and scale of the centralized model?2. What is the desire, available investment and feasibility for the deployment of an organization-wide CRM? Do we want to leverage existing systems (e.g., AMANDA) or procure a new solution through an external vendor? <p>Alignment on these two areas will guide subsequent decisions related to service operating models, technology and the establishment and on-going measurement on service and performance metrics.</p>
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Summary of Implementation Workplan

The proposed workplan below is meant to act as a guideline and support the Town of Halton Hills in implementing the defined recommendations. However, there are many factors influencing the timing and cost of the recommendations and therefore it is expected that workplan will need to be refined and updated as activities are completed. The ability for the Town to be flexible and agile through the long-term transformation is very important as there will be inevitable changes to the service and operational landscape of today.

The phased implementation plan is the proposed cadence of activities to best build the foundation and then align the various elements to effective customer service delivery. That said, recommendations can begin to be addressed and thought through earlier than what is proposed in the workplan (identified by the grey boxes) to drive quick wins and make incremental changes as the Town works through the transformation.

ID	Phased Recommendation	Short-Term (1 - 3 Years)				Medium-Term (3 - 5 Years)				Long-Term (5+ Years)			
Stage 1: Preparation													
1A	Design a Centralized Service Delivery Model												
2F	Determine Customer Relationship Management Solution												
1E	Develop Change Management and Communications Plan												
2C	Develop an Enterprise Content Management (ECM) Strategy and Tools												
1B	Develop Department Service Agreements & Processes												
1C	Develop Centralization Service Resource Model												
1D	Integrate Technology Systems Required for a Centralized Service Delivery Model												
1F	Design & Build Customer Service Desks to Support the Centralized Model												
2E	Develop Hybrid Working Model Processes and Procedures												
Stage 2: Initiation													
2A	Expand AMANDA System Functionalities												
2B	Expand Mitel Telephony Functionalities to Support Reporting and Analytic Needs												
2D	Redefine Website Architecture												
1H	Expand Online Self-Serve Functionality												
3A	Develop Customer Service Performance Measurement Framework												
3B	Develop Data Governance, Management and Reporting Framework												
3C	Determine Department Service Levels / Standards												
3D	Develop Customer Service Training Framework for Customer Service Roles												
Stage 3: Expansion													
1I	Develop Comprehensive Customer Online Service Portal												
1F	Develop Virtual Consultation Initiative Design and Implementation												
1G	Develop Multi-Facility Self-Serve Kiosk Design and Implementation												

2.0 Service Operating Model

A service operating model is the representation of how an organization is organized to deliver value to its customers. The service operating model must be explicitly designed to support the customer service strategy and includes the way people, processes, and technology get integrated to deliver key capabilities. Deciding on a service operating model which integrates customer service is not a one-size-fits-all solution. The Service Operating Model recommendations will provide actions to create a dedicated customer service function and enable customer-centricity across the Town of Halton Hills.

The following section will detail three elements of the Service Operating Model for Halton Hills: Service Centralization, Facility Design, and Online Services.

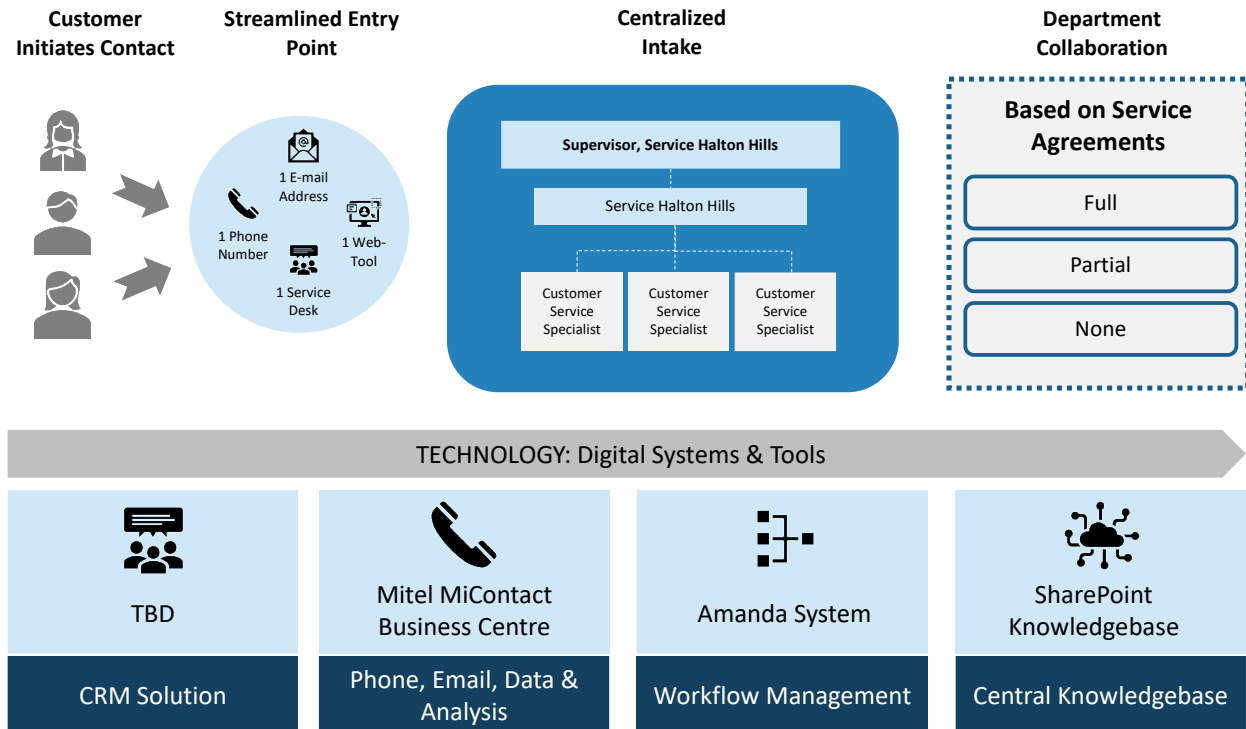
2.1 Service Centralization

A centralized service model is recommended for the Town to streamline customer inquiries to increase internal efficiencies and heighten the customer experience. A centralized model improves customer wait times, delays, and difficulties customers have contacting the right person or department. Current efforts towards partial centralized service, through Service Halton Hills, has been cited as positive among most departments. Departments believe further centralization would assist in managing the flow of complaints into departments from a single source, alleviating internal department pain points associated with customer service. Most departments do not have a dedicated customer service role and the centralized function will alleviate the need for roles to balance competing priorities of customer service and core job function tasks.

Service Halton Hills – Centralized Model Expansion

The centralized customer service model is based on a single point of entry for all customer service requests. Customers will have the option to contact Service Halton Hills via phone, email, web-based tool, or in-person service desk. All in-bound contact points will be streamlined by limiting access through one phone number, one email, single contact page on a web-tool and one physical service desk. In all scenarios, Service Halton Hills acts as the first point of contact with the customer, however the level of responsibility to process the request varies by service and department. It is expected that Service Halton Hills representatives will manage service interactions for all departments based on the defined departmental Service Agreements. Below is a visual summary of the centralized function.

Halton Hills Service Delivery Review & Customer Service Strategy
Customer Service Strategy Report



Centralization Operating Model Details

The governance structure and operating logistics of Service Halton Hills will include:

I. Governance

The Service Halton Hills team will remain in the Office of the CAO department and currently includes the following roles:

- 1 Supervisor, Service Halton Hills
- 3 Customer Service Specialists

Note in the expansion of the centralized service model the Service Halton Hills team will require additional resources. Additional resources are dependent on the amount and sophistication of services to be centralized as guided by the department Service Agreements. See pages 10-11 for preliminary resource modeling.

II. Operating Service Desk

A Centralized Service Desk will be established to manage initial customer contact:

- Overview: General walk-in customer support and all digital channels (phone, email, online requests)
- Location: Townhall (Main Lobby)
- Operating Hours: Monday – Friday (8:30am – 4:30pm).
- After-Hours Service: Option to expand to after-hours service (see below)
- Service Channels:
 - Service Desk – physical location for in-person service to customers
 - Phone - one external number available to customers

- E-mail - one external address / inbox available to customers
- Resources: Coverage for the Service Desk is recommended to include 2 Full- Time, Cross-Trained Customer Service Representatives Available During Operating Hours

After-Hours Service: There is potential to expand after-hours service calls within the hybrid working model. Service Halton Hills representatives can work remotely outside of the Townhall hours of operations.

Note: It is recommended that a single email address (e.g., info@haltonhills.ca) is aligned to a shared inbox accessible by both the service desk and contact centre. Features within the Mitel MiConnect Business Centre email feature support functions like group email management, collision detection, automated emails and insights and analytics. This streamlined approach will ensure only one email address is shared to the public, but resources across hybrid locations can view, access, and manage customer inquires collectively as a broader team (regardless of physical location).

The Benefits of a Centralized Service Center

The recommended centralized service model for the Town will result in many benefits to the organization. The major benefits can be categorized as follows:

- **Economies of scale per-transaction:** number of calls, emails, web inquiries.
- **Improved customer communication:** a centralized location offers a single point of contact for customers, who can be transferred to the appropriate department for service, if required.
- **Improved management and supervision:** one manager can easily supervise and mentor many more employees through a centralized model to ensure consistency of service provided.
- **Improved quality of staff training:** a centralized training program for all Service Team staff will ensure training is consistent and valuable, leading to better customer experiences.
- **Improved analytics and error reduction:** a centralized location makes it easier to gather data for analysis, and to address errors and other issues quickly.

A centralized service model will enable Halton Hills to develop a front-line centre of excellence for handling customer service needs, while leveraging back-office service workflows. There are many variations and models to service centralization; however, there are Guiding Principles of service centralization to assist Halton Hills with moving through the transformation.

Guiding Principle	Goals Addressed
Create a dedicated customer service function and transfer customer service workload from departments	<ul style="list-style-type: none"> ● Consistent experience ● Provide services cost-effectively ● Get to the right person quickly
Enable the function to address phone, in person, email and online portal	<ul style="list-style-type: none"> ● Simplify access ● Consistent experience
Define new customer service positions	<ul style="list-style-type: none"> ● Consistent experience
Redesign customer service processes	<ul style="list-style-type: none"> ● Consistent experience
Define service Key Performance Indicators (KPI's)	<ul style="list-style-type: none"> ● Define clear service levels ● Design service around customer needs
Leverage an integrated technology tool to better manage customer processes	<ul style="list-style-type: none"> ● Modernize interaction tools ● Centralize customer information ● Digitize more services
Leverage a shared knowledge base for all staff	<ul style="list-style-type: none"> ● Consistent, efficient answers to customers from all staff

Guiding Principle	Goals Addressed
Organize the design of workflow IT tools and service centralization	<ul style="list-style-type: none"> Streamline service team ability to execute the workflows Enable service teams' accessibility to functions and information

Service Halton Hills Representatives / Resourcing

Staffing for a centralized function has implications for the number of resources, skillsets and knowledge required, and training development. In the expansion of the number or complexity of services offered, the centralized function will need to respond with increased staffing and training. Service Halton Hills currently has four dedicated full-time staff, consisting of 1 Supervisor and 3 Customer Service Specialists.

As the centralized unit expands, the Town will be required to determine how much to scale up the customer service team. The following metrics provide insight and guidance into how many resources will be needed. Data collection must be expanded to track the following metrics.

Resourcing Metrics

Metric	Calculation
Incident Rate	Incident Rate = Total Monthly Tickets / Customer Count
Customer Growth Rate	Customer Growth Rate = (Current Customer Count / Previous Customer Count) / Previous Customer Count
Avg. No. of Tickets per Representative	Avg. No. of Tickets per Representative = No. of Tickets / Reps / Month
Total Representatives Needed	Total Representatives Needed = Total Monthly Tickets / (No. of Tickets / Reps / Month)

To accommodate multi-channel delivery, resource scheduling should reflect the customer service channels. Delegating responsibility of in-person and digital channels will decrease competing demands across channels to ensure customer needs are adequately met. All Service Halton Hill representatives should be cross-trained and able to complete full responsibilities of each function.

Schedule roles or duties should reflect the two functions:

- Representative A: Responsible for all in-person interactions and assists with digital channels overflow as time / demand permits
- Representative B: Responsible for management of all digital channels, which includes email, phone, and online services

As the centralized model expands and additional representatives are hired, there is opportunity to provide a hybrid working model for reps scheduled Representative B shifts. With the right technology and systems access developed, this provides opportunity for remote work. Although beneficial to employee experience and hiring, this is not recommended to be implemented until full sophistication of processes are established.

Based on preliminary assumptions of services to be centralized (see Services for Centralization below), projected resourcing has been determined based on full centralization. Note that the resourcing does not take into consideration the reduction of resourcing needs due to deployment of online self-serve options or process automation / efficiencies. A full resourcing model is to be determined and estimated once all centralization and digitization initiatives are modeled.

Halton Hills Service Delivery Review & Customer Service Strategy

Customer Service Strategy Report

Estimates determine Service Halton Hills will require an additional 5 resources after full centralization is complete. This does not mean that five additional resources must be acquired to the Town, but considerations for leveraging existing resources through reassignment. Best practice, when applicable, is to leverage existing admin or coordinator roles from other departments which provides a 'subject-matter expert' to assist in onboarding of department services.

The below chart provides the estimated volume and effort for proposed services to be centralized. Please see Appendix IV for the detailed Centralization Resource Model.

Additional Effort per Year	9219
Hours per Year per Resource	1750
Additional Resources Needed	5

Note: Many assumptions were made to estimate the volume and effort required for services as the data was not available.

Services for Centralization

Determining which services to be centralized is imperative to the activation of the centralized model. These services will inform the system and process changes necessary to deliver services within the centralized model. As example, workflows for each of these services will need to be clearly defined to operationalize the people, process, and technology requirements.

The purpose of centralizing customer service is to create a streamlined, direct point of entry for all customer needs. To do so, leveraging the 'Jobs-to-be-Done Framework' allows us to design access to services based on customer need. The Jobs-to-be-Done Framework is an approach to developing services based on understanding both the customer's specific goal, or "job," and the thought processes that would lead that customer to complete the job.

Below is a preliminary list of the Jobs-to-be-Done to guide the centralization of services.

- Resolve Customer Inquiries & Complaints*
- Complete a Payment or Make a Purchase
- Complete or Manage a Booking (Facility, Inspection)
- View or Access General / Personal Information
- Submit or Pick-up Documents (applications / permits, FOI request)
- Complete General or Non-complex Applications (Burn Permit, Dog License, Firework Permit, Marriage License)

**Option for social media inquiries and complaints to be centralized into customer service function. Further analysis of volume and type of interactions should determine best resource to respond.*

**Let's Talk Halton Hills platform will remain the responsibility of Communications Department and the Communication Team will triage Service Halton Hill inquiries.*

Department Collaboration

Department collaboration is an essential component to the activation and ongoing success of the centralized function. Upon initiation, departments will be required to provide Service Halton Hills with agreements for all service requests performed by the department. A detailed list of service and service processing responsibilities is summarized below.

- **None:** Centralized Service Team does not perform any activities related to the processing of the service request. The Service Team would triage the request and pass it off immediately to the

related department. The specific details will be defined in the Service Agreements for each department.

- **Partial:** Centralized Service Team to share ownership of responsibilities to process customer service request. This could involve the Service Team working with a department SME to process a transaction or handing-off the transaction at a specific moment in the process. The specific details will be defined in the Service Agreements for each department.
- **Full:** Centralized Service Team to own all customer interactions related to the service request. Individual departments do not need to process any service-related requests. The specific details will be defined in the Service Agreements for each department.

Further details of each category are detailed below.

None	Partial	Full
<p style="text-align: center;">CRM Service Halton Hills representative receives and logs service requests into a CRM</p> <p style="text-align: center;">Warm Transfer Service Halton Hills representative will complete a warm transfer of all department inquiries or re-direct customer to digital services to begin a process</p>	<p style="text-align: center;">CRM Service Halton Hills representative receives and logs service requests into a CRM</p> <p style="text-align: center;">Knowledgebase Service Halton Hills representative will provide basic information from a knowledgebase</p> <p style="text-align: center;">Warm Transfer Service Halton Hills representative will take details of the request and complete a warm transfer to the department</p>	<p style="text-align: center;">CRM Service Halton Hills representative receives and logs service requests into a CRM</p> <p style="text-align: center;">Knowledgebase Service Halton Hills representative will provide basic information from a knowledgebase</p> <p style="text-align: center;">Process Request Service Halton Hills representative processes the request</p> <p style="text-align: center;">Warm Transfer Service Halton Hills representative will take details of the request and complete a warm transfer to the department</p>

Department Service Agreements

Each department will be required to submit a Service Agreement to Service Halton Hills. The Service Agreement is a documented agreement between Service Halton Hills and the department which identifies the services required and expected levels of service. It is the responsibility of the department to ensure that the Service Agreement is accurate and up to date.

The Service Agreement should outline the following information / categories:

1. Document Details
 - a. Version Details
 - b. Document Change History / Review Date

- c. Document Approvals
2. Agreement Overview
 - a. Service Agreement Introduction
 - b. Definitions / Glossary of Terms
 - c. Purpose
 - d. Contractual Partners
3. Service Agreement
 - a. KPIs and Metrics
 - b. Service Levels, Rankings, and Priority
 - c. Expectations and Limitations
 - d. Responses and Responsibilities

Technology

Successful delivery of services through the centralized model requires the right technology supports. Technology supports for a centralized model will aid in the access and sharing of pertinent information, automatization of workflows, and tracking of multi-channel communications with customers. To operationalize the centralized model, the following technology systems / solutions are identified:

- Customer Relationship Management – a centralized system to track all customer interactions across all channels (solution to be determined)
- Central Knowledgebase / Information Sharing – leverage SharePoint as a knowledgebase tool to store all Service Agreements and documents
- Workflow Management – leverage AMANDA and existing technologies to automate or integrate processes incoming and outgoing from the centralized function (workflow solution is dependent on the most suitable for the business process)
- Mitel Telephony – continue to use Mitel as the phone system but expand the reporting and analytics capabilities
- Online Portal – not a requirement for the centralized model but will alleviate the resources needed / should reflect centralized model

To service a wide range of requests, Service Halton Hills will require access to department-specific digital systems as required by the Service Agreements. If possible, it is recommended to centralize and integrate systems to limit the number of necessary systems Service Halton Hills is required to use. The Service Agreements will determine the information and access needs for Service Halton Hills, which should be taken into consideration when determining the CRM solution and the expansion needs of AMANDA.

2.2 Facility Design

Facility design can be leveraged to support a centralized customer service function and provide customers with greater ease and access to services. Currently, customer service is provided in-person at Townhall through Service Halton Hills, at select department desks, and at recreational facilities. Recreational facilities operate separate service desks to facilitate in-person, phone, and digital inquiries. Regarding facility design and use, two main decision areas are identified:

1. How can the Town leverage the Townhall Masterplan to facilitate and guide customers toward the use of the centralized model?
2. How should the Town leverage the design and use of facilities to provide more convenient access to services without compromising the centralized model?

Firstly, Halton Hills has been engaged in the development of a Townhall Master Plan to determine the physical design and usage of the Townhall. The current design does not provide customers guidance to where to find assistance and customers may access individual departments. This provides opportunity to leverage re-design of the physical space to compliment a centralized model. The current recommendations reference the Townhall Masterplan Feasibility Design (February 23, 2022, SMT Meeting).

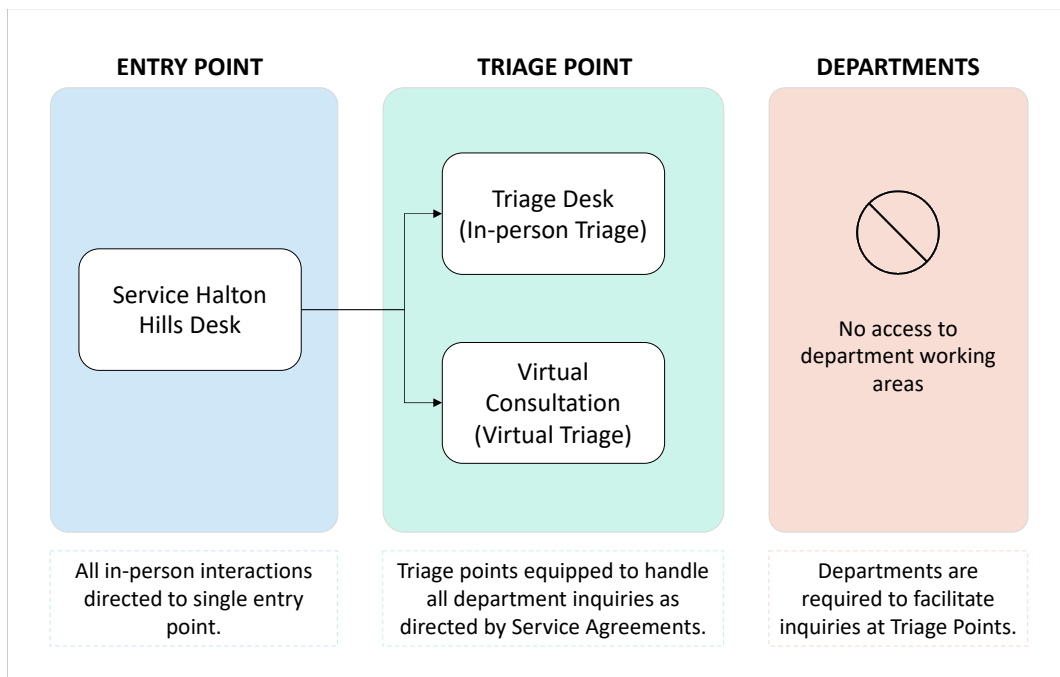
Secondly, it is not recommended to expand the centralized services or activities to multiple facilities. The Town currently does not have the technology, processes, or resources to successfully deliver customer service activities at multiple facilities. Yet, there is opportunity to expand the availability of services at facilities through virtual / digital methods which can still be managed remotely by the Service Halton Hills team. Many steps would have to be made prior to implementation, such as modernization and digitization of service delivery – yet if pursued as a future-state goal today’s steps will build the foundation.

Overall, to support the centralized customer service function and expansion of services at facilities, we recommend the addition of (1) customer service desks, (2) virtual consultation, and (3) self-serve kiosks.

Customer Service Desks

The expansion of the main lobby area will enable the Town to streamline the physical design of the in-person experience. The addition of Customer Service Desks at Townhall will assist in centralizing all incoming inquiries and facilitating in-person triage to appropriate departments. To centralize all in-person inquiries, direct access to all departments and department areas is suggested to be closed to customers. All customers must first visit the Service Halton Hills Desk to be assisted. The Service Halton Hills employee will resolve the request or triage the request to the appropriate triage point. Two triage points are available: Triage Desk or a Virtual Consultation Room. See the Figure 1 for a representation of the flow of customer interaction.

Figure 1. In-person interaction Triage



Within this model, three additional customer service areas are outlined: (1) Service Halton Hills Desk, (2) Triage Desk / Meeting Room, (3) Virtual Consultation Room. A description of each is found below.

Service Halton Hills Desk (Entry Point)

- The Service Halton Hills desk acts as the first point of contact for all customers entering the building on the 2nd floor
- Service Halton Hills customer service representatives located at this counter intake all in-person and digital inquiry channels
- Incoming inquiries or requests are handled at the time of contact or triaged to the appropriate department or role as identified in the department Service Agreement
- Customers are only triaged from this desk to the Triage Deck (in-person triage) or Virtual Consultation (virtual triage)

Triage Desk / Meeting Room (Triage Point)

- In-person triage option if the inquiry cannot be handled by the Service Halton Hills Desk
- All access to departments will be restricted and staff are required to complete requests at the triage counter
- The triage counter should be equipped with AODA-compliant design and appropriate technology to facilitate in-person service requests (based on Service Agreements)
- Option to use existing meeting rooms as in-person triage point

Virtual Consultation Room (Triage Point)

- Virtual triage option if the inquiry cannot be handled by the Service Halton Hills Desk
- See Virtual Consultation below for further details

All in-person customer interaction would reside within the main area of the Townhall, closing all customer access to department areas. Eliminating direct access to departments is essential to a centralized model as it mimics the digital channels and provides a consistent service structure across all channels. Consistency across all channels will overtime nudge customer behaviour to one point of contact for the Town. This one point of contact allows more efficient tracking of customer data, less distractions for individual departments, and increased efficiencies due to less redundancy and streamlined workflows.

Inclusive Service Delivery

In serving a growing and diverse population, the Town may leverage the Service Halton Hills team and re-design of the Townhall to support inclusive and accessible service delivery. The development of a comprehensive diversity, equity, and inclusion strategy is planned for the Town, which should take into consideration the following elements:

- Train customer service staff members on AODA-compliance, inclusive service delivery tools / options, and cultural competency.
- Ensure accessible design of spaces beyond standard AODA-compliance. Consider needs of individuals with physical and invisible disabilities, such as neurodivergence. This can be solutioned using dedicated accessibility spaces for meeting rooms and ensuring the appropriate physical design and technology is available.
- Leverage assistive technology to support individuals with specific needs, such as language interpretation software or text telephony capabilities.

Virtual Consultation

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Changes to a permanent hybrid working model and shift to digital services provides opportunities to expand the ways Town staff interacts with customers. More customers are becoming familiar with virtual consultations tools, as championed by many public and private industries. This shift provides an opportunity for the Town to leverage more virtual channels to efficiently deliver service without compromising quality.

Virtual consultation will be available for customers to connect with employees that are working remotely to address inquiries and complete services. Virtual consultation can be accessed via triaged in-person inquiry, or by scheduling an appointment with the department or role. The virtual consultation provides an additional channel for customers to interact with the Town and resolves the gap in persona availability due to the hybrid working model. The virtual consultation initiative would allow customers to connect with Town staff from their personal devices (at home) or using a virtual consultation room (at Townhall or Customer Service Hub). Existing meeting rooms can be converted to support privacy while customers connect with staff.

Virtual consultation will require the right access to technology systems and processes, depending on the virtual services provided:

- Video Conferencing Platform – video conferencing platform (such as MS Teams or Zoom)
- Scheduling Software – video scheduling software can be integrated with major video conferencing platforms to manage scheduling (such as Calendly or provided by CRM solution)
- Access to department-specific software / programs – dependent on each department Service Agreement the department will be responsible for providing access to necessary technology

Each department would be responsible for managing the department meeting schedule and servicing triaged inquiries. Encouraging customers to schedule meeting times will allow departments to better manage customer service. For high-demand departments, departments should delegate a point of contact for triaged inquiries; this role may rotate based on internal department needs.

Customer Self-Serve Kiosks

Customer-centric service design looks at the delivery of services from the customer's perspective. This means that process is designed with the customer top of mind. Establishing a service model that allows for multi-channel service delivery includes the expansion of how and where customers access services. Expanding service offerings at facility locations across Halton Hills will allow more convenient access to services. This can be done through customer self-serve kiosks.

Self-serve kiosks would be placed in municipal centres to expand the access to municipal services across multiple locations and provide citizens with self-serve access. The functionality and design of the kiosks are dependent on the sophistication of the centralized and online services available. The intention of the kiosks is to provide an alternative mode of completing digital services at more convenient locations for the customer.

Use cases for the customer service kiosk include:

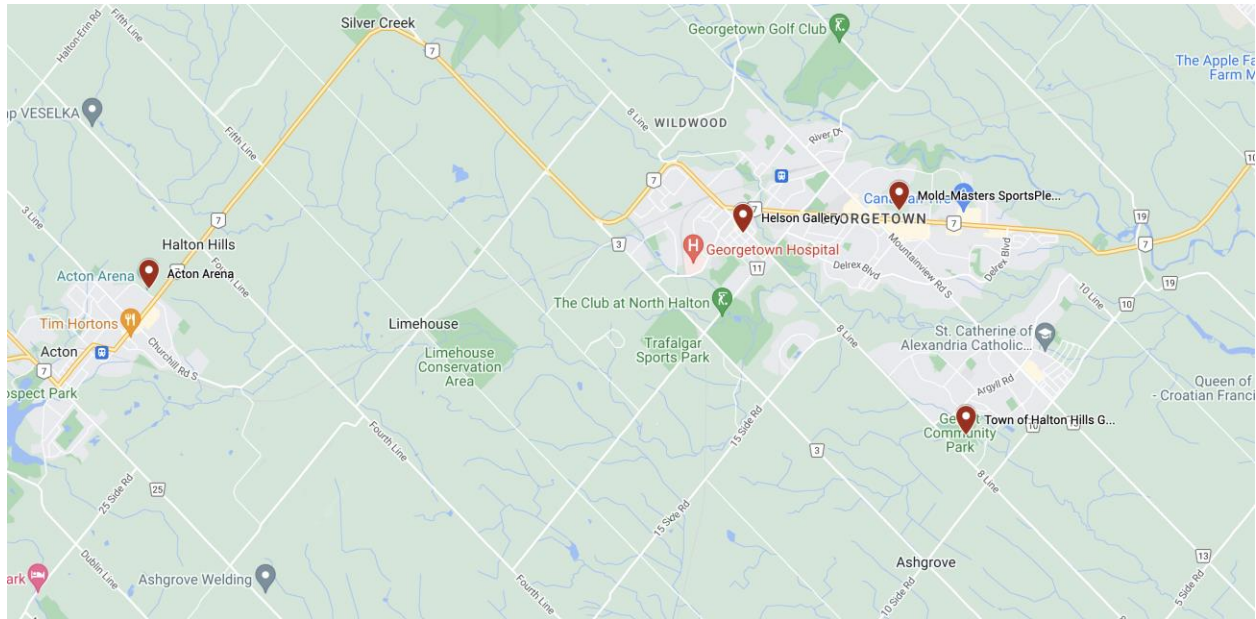
- Booking a facility or program
- Make a service request
- Making payments
- Scanning / submitting documentation
- Accessing information through the Town's website or FAQ
- Provide feedback about Town services

Kiosk support will be managed by the Service Halton Hills customer service team. If customers have questions about the kiosk or services provided, they will be prompted to contact Service Halton Hills.

Expansion of Virtual Consultation and Kiosk Locations

Traditionally, Townhall has been the only place where citizens can access multiple services. Expanding service options provides greater convenience for the customer to complete interactions at multiple locations and outside of traditional business hours. The following recreation or community centres have been identified as potential expansion options for Customer Service Hubs. These centres have been chosen as they have dedicated service desks run by Halton Hill employees (not volunteer), attract customers from a range of activities, and are open outside of traditional business hours. Potential customer service hub locations include:

- Mold Masters Sports Plex
- Acton Arena & Community Centre
- Gellert Community Centre



Hours of Operation

Expansion of service offerings to the following facilities expands the hours of availability. See below for a chart of operating hours.

Hours of Operation	Townhall	Mold Masters Sports Plex	Acton Arena & Community Centre	Gellert Community Centre
Weekday	8:30AM – 4:30PM	6:30AM – 11:30PM	6:30AM – 11:30PM	6AM – 9PM
Weekend	CLOSED	6:30AM – 11:30PM	6:30AM – 11:30PM	7AM – 5PM

2.3 Online Services

There is an increasing customer preference for self-serve options and on-demand support. Expansion of the breadth and sophistication of online services provided by the Town will lay the foundation for future self-service functions. The current website is primarily used for information sharing only. There are several services that are not provided online or many that cannot be fully completed online. Many

services have information or forms available to begin a service, but customers cannot complete end-to-end services. The Town has a huge potential to improve the customer service through online services to residents. To this end, the Transportation & Public Works Department are currently developing an electronic permitting process, with the initial focus on Building Permits. The initial electronic permitting process/system is expected to be online in Q1/Q2 2023 and will gradually expand to incorporate additional permits and processes associated with the Transportation & Public Works Department. The online channel is used by many municipalities to provide municipal services to be consumed from anywhere, anytime.

To encourage the use of online services and nudge customer behaviour, online services must be easy to use and consistent. Online services should be designed and streamlined to limit time spent to find the right online service, complete the process, and access support if needed. Online services should be consistently provided within the ‘job’ or task the customer is trying to complete. As a start, the online services should focus to supplement the centralized model. All services to be centralized must first be digitized so they are accessible across multiple business units. This provides an opportunity to plan these services for online access to customers as backend workflows must be automated.

Key Categories & Services

Aligned with the key categories for centralization, the following is a preliminary list of the proposed services to expand the sophistication of what is offered online. **Note that the goal is to design the following online services to be completed end-to-end online.** Additional services may be identified through department or customer feedback.

The below chart identifies the status of the proposed services:

- Full – the service can be fully completed online
- Partial – the service can be partially completed online or not all tasks can be completed online
- None – the service cannot be completed online
- Planned – the service is planned to be available for online completion

Category	Service	Status
Address an Issue or Inquiry	Submit a general inquiry	Full
	Submit feedback or a complaint	Full
	Submit a service request	Full
Complete a Payment or Make a Purchase	Utility billing and payments	None
	Online payments for accounts receivable	None
	Vendor invoicing	None
	Permits and applications	Partial
	Purchase dog tags	Full
	Parking tickets	Full
	Program Registration for Associations	None
	View availability of facilities / facility schedule	None

Complete or Manage a Booking	Complete a facility booking	Full
	Recreation program registration	Full
View or Access Personal Information	Tax bills and account review	Planned
Submit an Application / Permit	Building Permit applications	Planned
	Planning applications	Planned
	Parking permits	Full
	Burn permits	Full
	Marriage license requests (not able to be fully online)	Partial
	Road occupancy permits	Partial

Customer Service Online Portal

Online portals can enhance the customer experience through providing a one-stop digital access to multiple Town services and information. This streamlined user experience has become increasingly popular within the municipal context. The sophistication of customer service portals can vary depending on resources, in-person and digital services provided, or systems integration. As a first step, municipalities can refine the information architecture to direct users to services in a more efficient manner and automate backend workflows. More advanced customer portals enable customers to sign onto the customer portal to view customized information, such as property information, tax payments, or application status. Determining the online portal solution will require the Town to determine the services to be offered, what the backend integrations / workflows required are, and the closed-loop processes.

The AMANDA System has the expansion capabilities to build a customer-facing online portal. Through the portal, customers can create service request that can trigger internal workflows to automate customer service requests. The portal can provide greater transparency to the customer in the status of an application, request, or workflow. This option is viable for the processes and systems that are currently used in AMANDA. Integration of other systems into AMANDA may not be ideal to provide a full range of services within the portal.

Benefits of customer service online portals include:

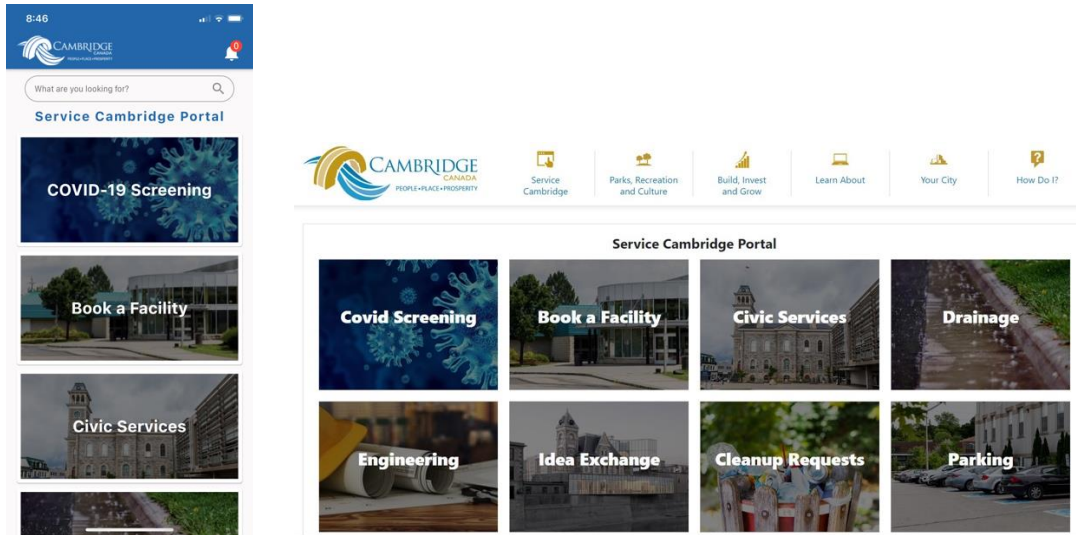
- Reduces Customer Service Costs – Self-service portals increases customer autonomy and enables customers to complete tasks independently, limiting reliance on customer service staff
- Improve Customer Service Representative Productivity – The portal will limit calls and need for customer support from service representatives relieving pressure to provide higher quality of service
- Provides Personalized Information – An intuitive self-service portal saves time and helps clients locate the information that they need more quickly by using information from past problems
- Increases Positive Customer Recommendations – A successful self-service portal strengthens the brand reputation by creating positive client interactions

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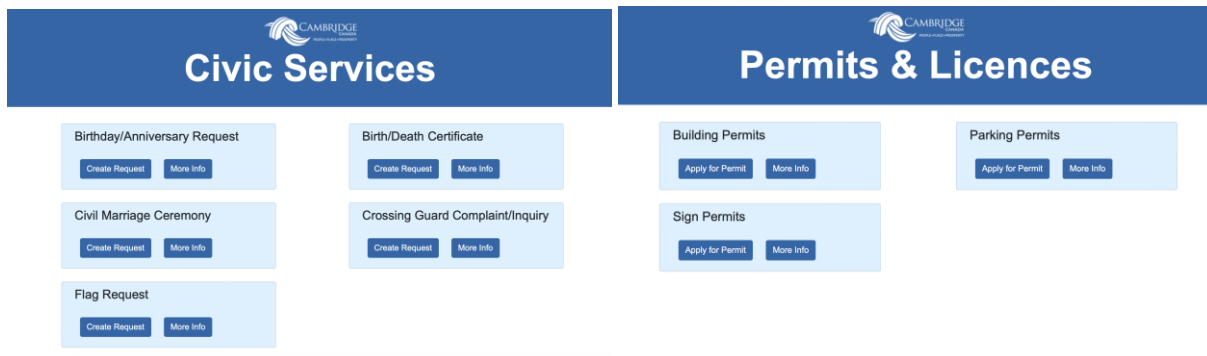
Customer Service Strategy Report

Service Cambridge Portal Example

The Service Cambridge Portal is an example of a streamlined user experience for all customer service information and needs. Customers can visit the web portal (www.servicecambridge.ca) or the mobile Service Cambridge app to access non-emergency services and information. The images below show the interface of the mobile application (left) and the web portal (right).



Within the portal, customers can choose a service or action of interest. This redirects customers to another webpage where they are provided more information, able to create a request, or complete a process online (see images below).



2.4 Service Operating Model Recommendations

The Service Operating Model recommendations outline the key areas for the Town to move towards centralized and customer-centric service delivery.

Service Centralization Recommendations

1A: Design a Centralized Service Delivery Model

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Details	Define a scaling maturity Centralized Service Delivery Model. Working with each department, the Town must determine which department customer service activities and/or services will be centralized. The centralized services are the organization or department services which will be managed by the Service Halton Hills team.
Implementation Considerations	<ul style="list-style-type: none"> • Collaborate with departments to determine which services will be centralized • Centralization should take a phased, multi-year approach to scale up the volume and complexity of interactions the Service Halton Hills team is responsible for • All centralized services must be able to be streamlined, digitized, and automated to provide access across multiple users • Complete process / workflow maps to first identify pain points and further streamline services. Leverage process maps as inputs into the Service Agreements and as training artifacts
Expected Benefits	<ul style="list-style-type: none"> • Streamline customer inquiries and service delivery increasing efficiencies • Increase customer satisfaction and ease to access / complete services
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$10,000 - \$50,000 • Ongoing Cost: N/A • Delivery: Supported by Vendor

1B: Develop Department Service Agreements and Process Maps for the Centralized Model

Details	<ul style="list-style-type: none"> • Define the service expectations and agreement of the service structure between all involved departments. The Service Agreements act as an agreement and reference guide for effective collaboration between the Service Halton Hills team and individual departments. The Service Agreements should include information to define the service expectations, division of responsibilities / expectations, service standards, key policies / regulations, and escalation procedures. Outline the elements required for employees to deliver services, including internal workflow, activities, employees involved, and IT Systems used.
Implementation Considerations	<ul style="list-style-type: none"> • All departments are required to submit and maintain Service Agreements • Collaborate with employees from each department to gather information to develop Service Agreements and supporting materials • Service Agreements should be aligned to the phased, multi-year Centralized Service Delivery Model • Complete process maps for all current customer-facing services as well as internal service support functions that will become part of the centralized model. Provide clear context on what services are centralized and what services are executed by individual departments (when and how). • Utilize the SharePoint platform to store / manage Service Agreements • Train employees on how to access and action Service Agreements (aligned to training recommendation)

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Expected Benefits	<ul style="list-style-type: none"> • Increased effectiveness of centralized model through role and process clarity • Increase first-touch resolution rate and reduced customer service inquiries to departments
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: N/A • Ongoing Cost: N/A • Delivery: Completed In-House

1C: Develop Centralization Service Workforce Model

Details	<ul style="list-style-type: none"> • Establish the appropriate governance structure and workforce model which supports the centralization of all in-bound service requests channels. The development of the centralized resource model will require the Town to strategically assess the Service Halton Hills team on an ongoing basis to adjust resourcing and training needs based on service volumes and roles expectations (aligned to Service Agreements).
Implementation Considerations	<ul style="list-style-type: none"> • Begin to track key resourcing metrics to continually assess and determine the needs for additional customer service representatives by delivery channel • Determine if the existing organizational team structure and hierarchy is adequate or needs to be refined to deliver on the scope of the centralized service model • Specific knowledge / skills required for the frontline Service Team needs to be aligned to all department expectations and documented in the Service Agreements. Department expectations may vary based on the types of inquiries and level of complexity expected from the Service Team
Expected Benefits	<ul style="list-style-type: none"> • Adequate workforce resourcing to meet customer demands leading to less risk of employee burnout and improved team morale
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: N/A • Ongoing Cost: N/A • Delivery: Completed In-House

1D: Integrate Technology Systems Required for a Centralized Service Delivery Model

Details	<ul style="list-style-type: none"> • Integrate service delivery systems and tools required to successfully deploy a centralized service delivery model. Tools required for centralization include a Customer Relationship Management (CRM) tool, knowledge management tool (e.g., SharePoint), centralized email and phone and employee access to relevant Town systems to process requests. Aligned to the Service Agreement between departments, provide the Service Halton Hills team access to or view rights to required Town systems necessary to complete customer requests.
Implementation Considerations	<ul style="list-style-type: none"> • Create a technology map of required systems and access levels necessary to deliver services outlined in the Service Agreements

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	<ul style="list-style-type: none"> Streamline public access from customer email. Create centralized service email / inbox and close existing “general” mailboxes of departments identified in this stage to have centralized services. Streamline public access from customer phone calls. Create a single, centralized contact number and restrict existing “general” departmental extensions of identified departments incorporated into centralization. Reorganize online / website inquiry submission platform to only send automated submissions from public to centralized service team and not the general mailbox of each department. Design & build a SharePoint site tailored to the centralized service model. Make the site accessible to Team Members as the primary knowledge management system. Upload all knowledge content to SharePoint including Training Materials, Job Aids, Process Maps, Service Summaries, Service Agreements.
Expected Benefits	<ul style="list-style-type: none"> Access to the right information and tools to complete customer service requests leading to increase efficiencies Enables Service Halton Hills to provide a broader scope of centralized services
Cost / Delivery	<ul style="list-style-type: none"> One-time / Implementation Cost: \$25,000 - \$50,000 Ongoing Cost: <i>*may incur costs if require additional IT resource</i> Delivery: Supported by Vendor

1E: Develop Change Management and Communications Plan

Details	<ul style="list-style-type: none"> Develop an overarching change management plan for the centralization initiative for internal and external stakeholders. Include a communication plan detailing the cadence and messaging to be provided to the public. The objective of the plan is to increase adoption of the program and communicate to the public the expected benefits of the initiative.
Implementation Considerations	<ul style="list-style-type: none"> Develop a public communication plan which articulates the definition and purpose of centralization, the prospective changes to service delivery, and the expected benefits. Determine the opportunities to provide feedback throughout the process and communicate when / how the feedback is actioned.
Expected Benefits	<ul style="list-style-type: none"> Increase adoption of the centralization initiative feedback from the public on what is working and what isn't
Cost / Delivery	<ul style="list-style-type: none"> One-time / Implementation Cost: N/A Ongoing Cost: N/A Delivery: Completed In-House

Facility Design Recommendations

1E: Design & Build Customer Service Desks to Support the Centralized Model

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Details	Centralize all in-person inquiries to one Service Halton Hills Desk as the first point of contact. Develop two triage points, as depicted in Figure 1, to facilitate in-person and virtual triage inquiries. Build an in-person triage desk or leverage existing meeting rooms for all in-person department inquiries. Close all access to department areas to customers.
Implementation Considerations	<ul style="list-style-type: none"> • Consolidate customer service counters to a single location within Town Hall to improve the customer experience and provide a focal point for customer service delivery • Improve the ability for customers to navigate Town Hall using signage and other wayfinding approaches • Dedicate a service desk and/or meeting room for all in-person triaged inquiries for departments to meet with customers • Ensure triage points are equipped with necessary technology to facilitate all department inquiries (e.g., computer screens, access to department-specific systems / programs)
Expected Benefits	<ul style="list-style-type: none"> • Streamline flow of customer inquiries / requests into the Town and reduce direct access to departments • Increase in tracking and accuracy of customer service-related metrics
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$10,000 - \$25,000 • Ongoing Cost: N/A • Delivery: Supported by Vendor

1F: Develop Virtual Consultation Initiative Design and Implementation

Details	Develop an overarching strategy and deployment plan for virtual consultations which will address hybrid inquiries (in-person customer request with a remote worker) and remote customer inquiries. Develop virtual consultation rooms at Townhall and select facilities (Customer Service Hubs) to facilitate hybrid inquiries.
Implementation Considerations	<ul style="list-style-type: none"> • Delegate and equip existing meeting rooms for virtual consultation including all necessary virtual conferencing technology, customer instructions / support, and hardware • Implement a scheduling software that integrates with existing calendars to allow customer to pre-book and on-demand book available meeting times for specific departments / roles. Ensure this is accessible to all in-person inquiries at Townhall and customers who wish to join remotely on their own devices • Provide staff training on new technology, processes, and expectations for virtual consultation • Promote virtual consultation initiative to customers providing clear instructions for use and access to support
Expected Benefits	<ul style="list-style-type: none"> • Provide customers with more convenient and personalized ways to connect with Town staff

	<ul style="list-style-type: none"> Support the hybrid working model and mitigate barriers for staff to connect to customers
Cost / Delivery	<ul style="list-style-type: none"> One-time / Implementation Cost: \$1,000 - \$5,000 Ongoing Cost: \$1,000 - \$5,000 Delivery: Completed In-House

1G: Develop Self-Serve Kiosk Design and Implementation

Details	<ul style="list-style-type: none"> Provide Self-Service Kiosks at Townhall and select facilities (Customer Service Hubs) to expand the access to services across multiple locations. Determine the services to be offered through a phased approach and in alignment with centralized / online services offered. Once requirements are defined, determine appropriate in-house capabilities and vendor requirements.
Implementation Considerations	<ul style="list-style-type: none"> Determine functionality and sophistication of kiosk services based on the use and popularity of requested services, the level of digitization of services, and ease of completing the service online Functionality of self-serve kiosks should take a phased approach to scale up the amount and complexity of services offered Design and implementation of self-serve kiosk initiative can only be completed after full digitization and expansion of online services Determine hardware and software requirements and vendor to design self-serve kiosk
Expected Benefits	<ul style="list-style-type: none"> Ability to provide access to services at multiple locations in a centralized model (reduce need for trained representatives at locations to handle inquiries / requests)
Cost / Delivery	<ul style="list-style-type: none"> One-time / Implementation Cost: \$1,000 - \$5,000 Ongoing Cost: N/A Delivery: Completed In-House

Online Service Recommendations

1H: Expand Online Self-Serve Functionality

Details	<ul style="list-style-type: none"> Expand the online self-serve functionality to increase customer ability to complete multiple end-to-end services online. Online services should reflect those provided in a virtual environment and those that are to be centralized.
Implementation Considerations	<ul style="list-style-type: none"> All services to be centralized or provided within a hybrid work environment must be fully digitized and automated to ensure access and up-to-date information across multiple users Complete process / workflow maps to first identify pain points and further streamline services. Leverage process maps and requirements to automate backend IT workflows Expansion of online services will eventually be integrated into the customer online portal (recommendation 1I)

Expected Benefits	<ul style="list-style-type: none"> • Simplified and easier access for customers to complete end-to-end services • Reduce staff time spent on manual tasks that can be automated • With the expansion of self-serve responsibilities for customer services could decrease reducing the resourcing model needs
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$10,000 - \$50,000 • Ongoing Cost: N/A • Delivery: Supported by Vendor

1I: Develop Comprehensive Customer Online Service Portal

Details	<ul style="list-style-type: none"> • Build an online portal that will enable the Town to offer their customers access to services and information anywhere, anytime, securely via the Internet. Define the design parameters for the online portal (features and functionality) which are aligned to the vision of creating a centralized, easy to use, seamless and secure digital experience.
Implementation Considerations	<ul style="list-style-type: none"> • Design of the customer portal will be dependent on online services expanded / offered and the CRM solution • Opportunity to develop a customer portal via AMANDA System expansions or CRM solution • Internal service processes should be formalized / documented to be streamlined and have automated triggers to support employees in completing activities to complete the back-office tasks associated with customers requests through the online portal. This should be considered and completed prior to the design of the online portal. • There are current initiatives that are looking to develop a form of customer portal (i.e., Building Services) for online services. It is important to plan for the future and looking to ensure that there is the ability to provide a comprehensive set of service offerings within a single portal as opposed to multiple different platforms.
Expected Benefits	<ul style="list-style-type: none"> • Increase ease of access to information and services • Reduce the number of inquiries into the Town increasing customer service representative productivity and quality of service
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$25,000 - \$75,000 • Ongoing Cost: \$1,000 - \$5,000 • Delivery: Supported by Vendor

Alignment of Recommendations

Cost & Efficiency recommendations uncovered within the Service Delivery Review are interconnected with the those that are defined within this Customer Service Strategy. It is expected that strategy recommendations may also drive cost and efficiency savings. To show how this can be the case, the following table outlines the alignment of these recommendations.

Note: Further details into Cost & Efficiency Recommendations can be found in the Service Delivery Review Summary Report.

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#	Recommendation	Key Outcome	Strategy Focus-Area
3	Provide virtual consultation and separate service desk options to customers to reduce time spent by Service Halton Hills employees trying to find information and provide answers to more complicated inquiries / issues	Streamline Activities	Facility Design
7	Digitize all payment functions to be completed via online / self-serve tools.	Increase Self-Serve Volume	Online Services
15	Update website with sections that have the most pressing information and high-volume interactions to reduce interaction volumes into the Town for simple requests.	Increase Self-Serve Volume	Online Services
16	Digitize all form submissions so they can be completed end-to-end online without having to jump to different service channels.	Increase Self-Serve Volume	Online Services
19	Identify a formal "Service Contact" within every department to act as the primary point of contact for centralized Service Halton Hills team to collaborate with when delivering services	Decrease Task Duplication	Service Centralization
20	Centralize customer inquires / complaints into a single-entry point - expand customer inquiry handling via social media channels to Service Halton Hills team. Comms still owns Let's Talk Halton Hills platform and triage inquiries to Service Halton Hills or appropriate department.	Decrease Task Duplication	Service Centralization
21	Update policy to ensure there are clear requirements for what types of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Decrease Task Duplication	Service Centralization
34	Centralize payment processing (i.e., reconciliation and organizing of reports / data files to be sent to Finance) to a single team to ensure consistency and efficiency in completing. Collaborating can be limited between this team and Finance to action any issues.	Streamline Activities	Service Centralization
37	Continue with the planned design and deployment of a Customer Portal for Property Tax services (i.e., information, statements, key information) to decrease the volume of customer inquiries into the Town	Increase Self-Serve Volume	Online Services
39	Digitize permitting process to allow for customer self-serve capabilities when completing applications and submitting documents	Increase Self-Serve Volume	Online Services
44	Develop Service Level Agreements (SLA's) between Service Halton Hills and other departments that clearly outlines responsibilities and what customer needs are to be completed at first point of contact and which are required to be triaged for support.	Streamline Activities	Service Centralization
49	Allow for services being done at Public Works building to be completed at Town Hall so that the building can remain closed	Mitigate Future Cost	Facility Design

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	moving forward. This will also decrease the number of customer entry points and promote centralization.		
50	Enhance online services for recycle bins so they can be purchased and shipped to customer s directly without interaction from Town employees	Increase Self-Serve Volume	Online Services
52	Enhance website functionality and ease of access to allow for up-to-date information on all available facilities, rooms, and other services. Provide detail for status of availability and ability to complete end-to-end need (i.e., research, book, pay, and confirm). This is an identified improvement and is planned for 2023.	Increase Self-Serve Volume	Online Services
54	Centralize customer inquires / complaints into a single-entry point. Review external platforms and communications systems (i.e., website) to update / remove specific "contact information" available to the public.	Streamline Activities	Service Centralization
55	Modify role responsibilities between Communications and Receptions teams to maximize synergies in similar tasks being completed. Minimizing the need for multiple review cycles for department then Communications team can decrease effort requirements. Leveraging existing Marketing / tracking type tools (i.e., Hootsuite) for recreation to be responsible for can remove steps in engaging with recreation customers.	Decrease Task Duplication	Service Centralization
57	Although the paper version of the brochure has not been offered for the past few years, it is recommended to continue to digitize annual brochure so it can be more easily socialized and delivered to customers at less cost (printing can be made available if requested by customers)	Mitigate Future Cost	Online Services
60	Digitize permitting process to allow for customer self-serve capabilities when completing applications and submitting documents Note: Single system between Building Services and Development Review team is required to ensure there are streamlined workflows.	Increase Self-Serve Volume	Online Services
61	Share customer inquiry / complaint activities with centralized customer service function to reduce the volume of incoming contacts to the department.	Streamline Activities	Service Centralization
65	Allow for fire / safety permits to be obtained at Town Hall and through online services. Promote the use of this to decrease customer inquiry volumes into the department.	Streamline Activities	Online Services

3.0 Service Technology

Technology is an enabler of customer service and is broadly utilized to improve lines of customer communication, effectively respond to customer needs, proactively understand and track customer preferences, and to keep customers informed. There are opportunities to expand the technology utilized to aid in the operationalization of the centralized customer service function.

The following section details three elements of Service Technology for Halton Hills: IT Systems Transformation, Hybrid Tools, and CRM System.

3.1 IT Systems Transformation

Today, more than ever before, municipalities are faced with the need to do more to meet customer expectations for fast and reliable service delivery. Municipalities are expected to deliver excellent public service as compared to their private sector counterparts while still respecting limited public funds.

There are increasing demands and expectations for efficient and customized services along the lines of the types of services provided by Amazon, Uber and other current technology-based service providers. Technology has become a key focus in being able to deliver effective and efficient municipal operations. The best run municipalities rely on technology to enable staff productivity, great customer service and cost effectiveness, with a focus on customer-centric service delivery driving the transformation of public service.

Technology can help achieve a range of goals for municipalities to better serve their communities. The first step is to determine the digital transformation goal – whether it is to better understand citizen desires, digitizing paper-based processes to increase efficiency, or creating new ways for citizens to access information and services.

The following best practices ensure digital transformation goals are relevant and successful.

<p>Start small, measure, test, and iterate</p>	<p>Starting small with an incremental approach allows for continuous learning and to adjust as needed based on user feedback. Prior to the project, the team should define what success looks like with metrics that demonstrate if you are achieving those goals, then regularly have conversations with your team on progress.</p>
<p>Consider human rights implications of new technology</p>	<p>It is increasingly important to have conversations about how you will assess, manage, and regulate new technology solutions with a focus on human rights. This includes considering the biases behind artificial intelligence models that automate decision making, and the potential for abuse of data being collected by the government or by malicious hackers.</p>
<p>Build for inclusion</p>	<p>While new technology tools can increase access to information, they can further isolate and marginalize those who already face barriers. Governments have an obligation to serve all their citizens, so design</p>

	must include all citizens. For those unable to access the needed technology, make sure there's an analogue fallback.
Communication	You are building these systems for your citizens, which means they should understand what it is for and how it can make their lives better. Frequent engagement during development reduces the fear of the unknown, and lets residents know a good idea is coming.

As it tackles modernization, it is important that the Town consider digitization from an end-to-end perspective. That is, digitizing all the steps in a process from the customer to the Town and back to the customer, not just small parts of the process. Such systems are in place in a growing number of municipalities across Canada, and not just large ones – small municipalities with 10,000 residents are now offering this level of service and this is the type of end-to-end service that the Town should aspire to deliver.

Digitization of services is one way to increase access and have a positive impact on a resident's experience with the Town, while offering opportunities to identify and achieve efficiencies. A focus on digitization will evolve the Towns' digital maturity from Aware through to Optimizing.

Digital Services Maturity Model

1. **Aware:** Organization exhibits few customer-centric/digital service capabilities.
2. **Developing:** Organization that has rudimentary set of customer-centric digital service capabilities.
3. **Practicing:** Organization has implemented basic customer-centric digital service capabilities.
4. **Optimizing:** Organization has not only developed customer-centric digital capabilities but also actively enables them and supports their development
5. **Leading:** Organization has evolved services based upon integrated enabling technology and supports digital transformation initiatives.

Measuring digital maturity is evaluated across four competencies of (1) **People & Organization** – Establish a long term organization model that can support and optimize the Town's digital vision (2) **Strategy & Business Capability** - Advancing Digital Service delivery becomes one of the Town's principle strategic objectives to accrue savings, benefits and deliver enhanced customer experiences (3) **Process & Operations Management** - A structured and guided approach to the creation of digital services is put into place; standard business process types are built to enable and support rapid development and digitization of services (4) **Technology Infrastructure & Operations** - Enabling technology applications are put into place to facilitate the rapid development of digitalized services.

Currently the Town is at a Low Maturity for digital service delivery. It is recommended that in alignment with the Town's Corporate Technology Strategic Plan, the Town finds solutions that will result in services becoming more efficient and modernized while maintaining legislated requirements and excellence in customer service. In addition, the digitization of services is required to enable a truly centralized service delivery model.

The benefits of digitization include:

- **Reducing costs** through operating efficiencies and shifts to lower cost delivery channel
- **Increasing opportunities** to better address resident needs by applying innovation, design, and digital technologies to existing services and creating new ways of delivering services
- **Increasing the accessibility of services** to a larger group of residents and businesses

- Assisting the Town to meet **environmental, social and governance objectives**

Based on a preliminary assessment of the Town, the following opportunities and corresponding benefits have been identified. The execution of the opportunities should be in alignment with the Centralized Service Delivery Model and the Town’s Corporate Technology Strategic Plan.

Improvement Opportunity	Benefit	Current Town Maturity
Ability to define “end to end” service processes for groups of similar services Use customer research and service design blueprints as enabling disciplines to drive better customer and operational experiences	<ul style="list-style-type: none"> • Provide a consistent customer experience for residents for similar types of services across business areas • Manage a common set of supporting processes and technologies across business areas 	Aware – Multiple technology systems are used across departments
Workflow Automation	<ul style="list-style-type: none"> • Routine tasks are automated using case management workflows, notifications and communications templates 	Aware – Most tasks are not automated
Customer Relationship Management (CRM)	<ul style="list-style-type: none"> • Case management files are digitized and managed and shared between staff using common applications and stored and archived electronically • Core applications capture the full set of information, tasks and notes required to manage a customer interaction 	Aware – No CRM system exists
Ability to manage, track and report on customer interactions	<ul style="list-style-type: none"> • Ability to manage interactions and interaction history to report progress and completion when important • Utilize reporting to monitor service delivery targets and promised results (aligned to defined KPIs) • Ability to identify bottlenecks in service delivery as well as process improvement opportunities • Ability to report on the types of services requested and identify trends 	Developing – Ability to run reports on most systems and used on a ad-hoc basis
Ability for residents to schedule appointments/inspections online	<ul style="list-style-type: none"> • Provide self-service to residents • Reduce repetitive calls to Town staff • Ability to send customer confirmations and reminders 	Aware – No online / self-service function
Ability to submit requests, registrations and applications online once and integrate the data from web and mobile submissions through to	<ul style="list-style-type: none"> • Ability to manage the submission as an interaction, including the ability to report on status, completion, and service level performance 	Developing – Online submission available with limited ability to track or report on status

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department applications without re-keying data	<ul style="list-style-type: none"> Ability to build a customer interaction history and a 360- degree view of the customer 	
Utilize portal technology to provide an online hub for customer interactions	<ul style="list-style-type: none"> Customers can sign and submit documents through an online portal Documents are automatically associated with requests and customer <ul style="list-style-type: none"> Customers can view the status of their request online including next steps. Then Customers are notified by text or email when a next step / action is required 	Aware – No portal available
Complaints and Feedback Request for Service	<ul style="list-style-type: none"> Ability to receive feedback for continuous improvement, manage and report on the status of the interaction electronically (Voice of the Customer) Can utilize templates for consistent communications with residents Utilize reason and resolution codes to facilitate reporting by area on key issues Manage the interaction and ensure that all interactions are responded to within service level targets 	Developing – Ability to collect feedback but used informally
Ability to book programs and courses online	<ul style="list-style-type: none"> Provide self-service to residents Ability to communicate with residents, including sending them information on a proactive basis 	Practicing – Ability self-serve to schedule recreational programs, purchases passes, and memberships
Electronic signatures	<ul style="list-style-type: none"> Ability to digitally sign applications, requests and documents Remove requirement for forms to be signed and returned in-person or by mail 	Aware – No digital signatures or submission
Electronic payments	<ul style="list-style-type: none"> Ability to consistently submit a payment online Remove requirements for payments to be submitted by cheque, certified cheque or cash in-person 	Aware – Inconsistent submission of payments online

To advance the digitization of services and modernization of customer service, it is imperative the Town follows a systematic approach in alignment with broader technology plans currently established. As a first step, the Town should look to establish the Program Framework and Standards. Specifically, this involves:

- Establishing the governance and program office model

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- Develop core principles and digital service standards to guide the approval and quality assurance of services before implementation
- Establish policies, funding model and approval process
- Develop detailed requirements for digitization of prioritized services

Once an appropriate Program Framework and Standards are established, the Town can then plan for the digitization and modernization of services. At a high-level, this typically includes:

- Declare core systems required for digitization and establish a decommission strategy and timeline to reduce duplication of application functionalities
- Decommission identified systems aligned to roadmap deployment
- Procure new technology applications and services (e.g., CRM)
- Integrate and deploy new technology applications
- Deploy end-to-end digital service delivery

Benefits of Digital Transformation

Customer service and service delivery will be improved by:

- Making service access more convenient through the enhanced use of digital devices (e.g., smart phones, tablets, desktops) commonly used by residents and businesses
- Decreasing the turn around time for a transaction by improving information intake, optimizing workflow, feedback/ status update mechanisms and improved cross department service integration by using case management approaches and tools (e.g., CRM solutions)
- Automating simple tasks and feedback mechanisms using new technologies so residents can readily get updates to simple and common requests, either proactively or quickly with an ad hoc request
- Process transparency, residents will know where they are in a process and how long it should take to get a resolution. This will be enabled through the deployment of online portals
- Designing processes that notify residents where they are in a process and how long it should take to get a resolution
- Businesses and residents will be able to take on tasks to expedite requests by using self-service tools to start a transaction and provide additional documents in a safe and timely fashion

Organization support will be improved by:

- Moving data from analogue to a digital format will support the standardizations and automation of records management across the organization improving data security, retention compliance, and access audits
- Staff will have seamless and secure access to the information required to do their jobs in the field and all service delivery locations
- Workflows will be optimized and automated where possible to move transactions quickly through the required process with the ability to track status and expedite bottlenecks
- Staff will no longer need to re-input data across systems, removing repetitive, error prone tasks from the process, improving data quality & security
- Digital signatures and online payment tools will improve access and convenience to customers and improve compliance and payment clearance rates

Critical Success Factors

Based on relevant successful leading practices, several critical success factors have been identified:

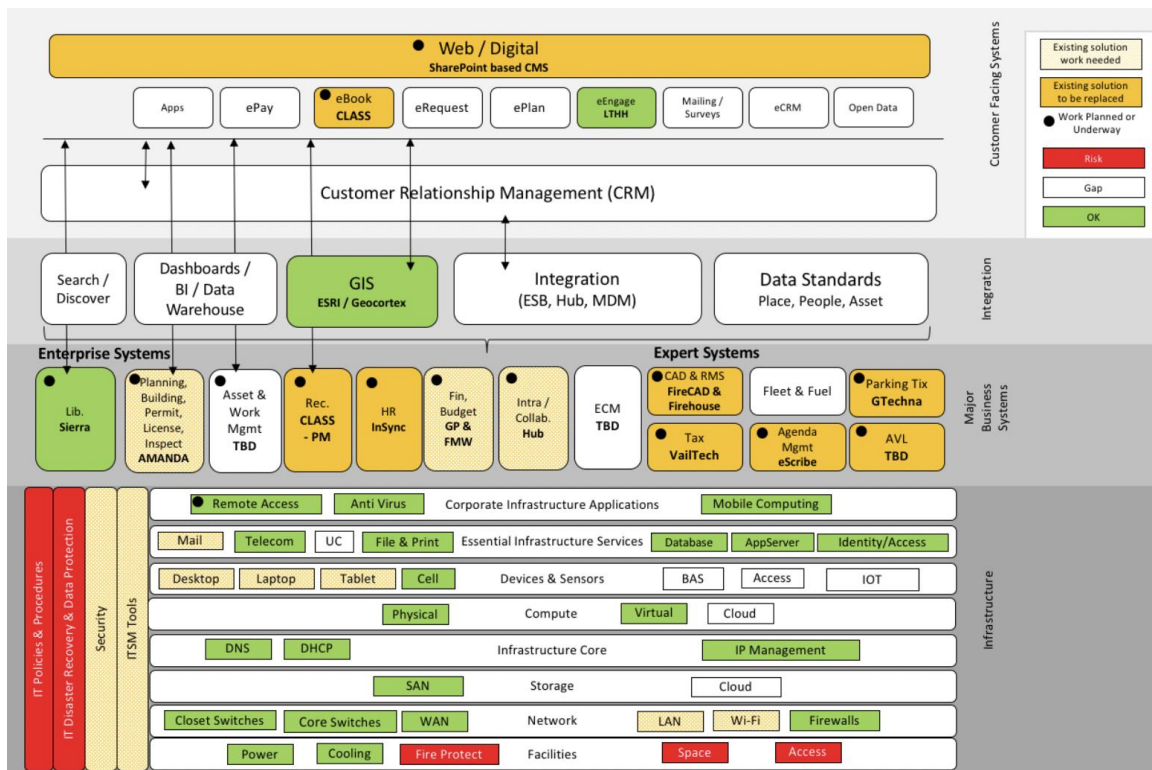
- Develop an executive governance structure that allows for rapid decision-making capability
- Support an advancing digital strategy with a centralized funding approach that enables Build / Maintain / Enhance aspects
- Obtain business unit commitment to an enterprise approach to designing and delivering digital services, which includes adopting common process standards and replacing department "point solutions" with enterprise-wide core applications where duplicate capabilities exist.
- Maintain a user-centric approach as a fundamental guiding principle focused on residents in front-end design as well as end-user staff for back-end design

Technology Relevance and Responsibility Check

- The goal is to make sure any new technology enhancements are responsibly considered. Use the following questions to guide decision-making around major technology projects. Is technology necessary for the project or is there a less technical solution to the problem?
- Do the advantages of a new technology outweigh the costs of implementation and organizational change?
- Does your organization have sufficient in-house expertise to assess, implement, and maintain the technology solution?
- Does your agency budget for and oversee this technology project? Including hiring or training technical staff for the ongoing management of this technology and project once it has been implemented?
- Is there existing technology that your organization already uses that you can use?
- Is this the right technology based on community access and technical capacity? What is the impact on vulnerable populations?

Taking these best practices into consideration, Halton Hills has several existing and potential technologies in consideration to supplement customer service or service delivery gaps. Multiple gaps continue to exist within the municipal technology architecture, as identified by the 2018 Corporate Technology Plan. Many gaps still exist within the Customer Facing Systems layer, such as customer relationship management and online options for customers (ePay, Apps, eRequest, etc.).

2018 MTA Assessment Results



For the relevance of the current project, the following areas have been highlighted as key priorities:

1. Customer Relation Management (CRM)
2. AMANDA System
3. Mitel Telephony
4. Enterprise Content Management (ECM)
5. Website

As identified in the report, there exists improvements in the Business Systems layer to maintain organizational effectiveness. The lack of these critical elements of the municipal technology architecture, lack of digitization, navigation of online services and information and inefficient or paper-driven processes impacts the Town’s ability to deliver services effectively.

Customer Relation Management (CRM)

A customer relation management system is a key piece of the municipal technology architecture that enables the municipality to manage customer service and service delivery. Within a centralized service delivery model, the ability to centralize or unify customer data into a single platform and provide access to teams across the organization is essential. In addition to providing greater customer interaction transparency, the CRM solution will additionally enable automation of service delivery workflows and processes.

Please see CRM System on pages 38 – 43 for detailed information on CRM recommendations.

AMANDA System

AMANDA is a commercial software product that enables business processes to be automated and is used for building permitting, planning applications, and various other activities. It is currently being used to track some workflows, but the use is not consistent across the organization. AMANDA has capabilities beyond its current use to support expansion of online services and CRM capabilities. AMANDA can be fully integrated to provide a public portal allowing businesses and citizens to apply for, submit, track, manage, and pay for services online.

AMANDA is currently used by several departments and workflows, yet there is potential to expand the use through further automation of current workflows and the expansion to other departments / workflows. Note that AMANDA is not suitable for all processes / workflows and external vendor offerings may be more efficient and user friendly (e.g., marriage licensing process). AMANDA is suggested to be leveraged in use cases where there is not a feasible vendor provided solution and a workstream must be created for the activation of centralized model. Considerations to leveraging AMANDA is to limit the number of systems / tools necessary for the Service Halton Hills team to access and manage.

Current Use Cases	Potential Use Cases
<ul style="list-style-type: none"> • Building Permits (Multiple) • Development Engineering (Entrance Permit, Road Occupancy Permit) • Planning Applications (Multiple) • Business Licenses • Enforcement • Requests for service (Public Works) • Payments (Manual entry / reconciliation) 	<ul style="list-style-type: none"> • Digital submission of Building Permits and Planning Applications • Business License Renewal • Internal document approvals • After hours call service reports • Tracking and monitoring customer inquiries • Enhance / improve automation of financial reporting

The build and deployment of AMANDA as a CRM would allow for an omni-channel approach to centralized information collection by gathering customer responses from multiple channels including, in person counter visits, phone calls, emails, and social media messages. This would require manual entry of customer interactions into AMANDA, as limited technology integrations are available. This would provide customer service representatives with a central database of information about the customer and any interactions they have had with the Town. This would improve the efficiency and effectiveness of customer service delivery by tailoring each response to the situation.

The success of AMANDA as a CRM tool requires defining the appropriate structure of workflows in alignment to the centralized service model. As well, it is understood that there are information privacy concerns for some services. These may require a separate workflow / folder to restrict access. By segregating these restricted workflows, it will still allow the centralized service team to access to the functionality and information required to complete the service transitions within their authorized discretion.

AMANDA also has the capability to support a customer portal which can enable greater self-serve and access functionality. Additional functionalities include:

- Payments for all Services – Self-Serve Functionality

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- Access to all Documents, Forms, Statements – Access Functionality
- Booking and Registration for all Requests – Self-Serve Functionality
- Visible Progress / Status Updates Along Process - *Access Functionality*

Note: The functionality listed above is a good start to support centralized service delivery. However, as service delivery becomes more sophisticated and additional features are required to transition to more digital customer-driven processes, AMANDA should be re-evaluated to ensure needs are still being met

Please see Online Services on pages 17 – 19 for detailed information on expansion of online services and CRM System on pages 38 – 43 for AMANDA CRM capabilities.

Potential Risk Identification

AMANDA is a viable in-house solution for the basic municipal needs or as an interim solution to some of the challenges stated above. Our consultations identified potential risks to full investment into AMANDA:

- The vendor has changed ownership multiple times which has impacted brand reputation and trust
- AMANDA is viewed mostly as a building and planning tool and is not as user friendly as other software designed for specific purposes which impacts organization-wide buy-in and change management
- AMANDA is a customizable software which must be programmed and maintained by subject-matter expert posing risk to the sustainability and reliance on in-house resources

Mitel Telephony

The Town currently uses the Mitel Telephony system which has limited functionalities. The current system can collect basic information on calls received and generate basic, standard reports. No customization is possible. To support the centralized model and the tracking of performance measures and service standards, the Town is recommended to upgrade the Mitel system.

The suite of products offered by Mitel MiContact Center Business is an enterprise-grade, omnichannel customer experience management platform. The functionalities are vast and provides the capability to include sophisticated IVR, analytics, scheduling / booking, automated credit card payments, chat, and email.

Key Features:

- Data-Driven Skills-Based Routing
- Voice, Chat, SMS, Email, FAX, IVR, Chatbots, and 3rd party media
- Self-Service IVR
- Speech Recognition and Text-to-Speech
- Expected wait time and position in queue announcements and web display
- Workflow Designer
- Customizable real-time dashboards
- Standard and custom historical reporting tools
- Omnichannel case management
- Outbound dialing and messaging
- Google CCAI-powered Virtual Agent and Agent Assist
- Scheduled and real-time callback's
- Agent/Supervisor instant messaging
- Mobile Agent (smartphone) and Supervisor (tablet)

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- Silent monitoring / barge-in
- Built-in Call and Screen Recording
- Integrated Quality Monitoring
- Built-in Workforce Scheduling
- Integrated Workforce Management
- Standard & customized CRM integrations via REST APIs and toolkit
- Integrates with MiVoice Business, MiVoice Connect, MiVoice Office 400, MiVoice 5000, MiVoice MX-ONE and MiCollab UC

Specifically, Mitel Business Analytics has two call analytics modules that are relevant to the Town: Insight and Report. Insight provides powerful data visualization via an intuitive dashboard and essential wallboard. The Report module delivers enhanced level reporting, performance dashboards and customized wallboards. Key metrics that can be tracked using this feature of Mitel include:

- Total Calls
- Total Incoming Calls & Total Outgoing Calls
- Total Missed
- Unreturned Missed
- Busiest Hour
- Average Answer Time
- Longest Call

It is recommended that the Town leverage this extension of Mitel to support tracking of operational KPI's related to service delivery. The Town should also leverage Mitel as the email provider for Halton Hills centralized team. Centralized management of email integrated into the telephony system will help to streamline service delivery performed by representatives.

Enterprise Content Management (ECM)

The Town is lacking a comprehensive ECM strategy that would define collaboration and document management across the organization. An ECM strategy becomes more relevant and necessary to support centralization and hybrid work models. These working methods requires employees to access information regardless of where they are working, requiring information management strategies that can manage information securely and at the same time promote use and accessibility.

Successful delivery of centralized service is also dependent on the establishment, maintenance and productive use of information and documents. Enterprise Content Management (ECM) with SharePoint provides the tools to organize and manage content throughout the content life cycle, from creation to archive. It is recommended the Town leverage SharePoint as the knowledgebase tool with the assumption that clear standard operating procedures are documented.

Currently SharePoint is not organizationally deployed for use by all departments. Ad-hoc solutions for general knowledge share by department are being used inconsistently. This has created a knowledge gap amongst employees to complete service transactions within their departments and across the organizations.

All relevant service documentation required for Service Halton Hills to effectively service customers through the contact centre and front-desk should be stored in SharePoint. This tool will provide the software centralization solution required for knowledge-sharing. However, employees need to be properly trained on how to use the tool and leverage it to complete routine job tasks. The selected CRM

tool should integrate into SharePoint. This will allow for a single-use application for CSRs to log customer service interactions and access the required information to process requests. This will increase efficiency for time to complete request and the quality of services provided.

Halton Hills Website

The Town website was last revised in 2018 and there has been several improvements made in the past years to the service offerings and functionalities. In consultation with users, customers provided feedback that the current Town website is not user-friendly and is difficult to navigate. Only 38% of respondents cited that the website was easy to navigate (21% Difficult; 42% Neutral).

The following are the most cited difficulties users experience with the Town's website:

- Difficulty with the general navigation of website / ability to find information
 - Cited examples: blue bins, bylaw, permits, animal control
- Difficulty with registration and cancellation for recreation programs
- Poor mobile-friendly experience, particularly within recreation booking
- Limited information on notifications on Town events and impacted closures
- Clear, plain language not used which is causing difficulty in understanding information
- Experiencing errors while trying to process payments
- No option to viewing availability for booking facilities (ice rentals)

It is recommended the Town undergo a website front-end review to enhance the usability of the site to address the above issues and support the use of the centralized model. Once the centralized model is determined the website and digital tools must be reflected to support the model. This could include the revision of current services to a streamlined online portal, eliminating direct contact to departments (dependent on Service Agreements), and revising of all content to ensure no contradictory processes / verbiage remains.

This could include changes to the development of the information architecture, search taxonomy, and standard services approach. Specifically, this would include:

- Conduct a detailed analysis of current content with action plans (rewrite, delete, archive, migrate) for each component
- Build a structured, visual sitemap that shows an architectural overview of the key pages of the site, their levels, and their relationship to each other
- Build wireframe templates of each unique page of the website
- Create design mock-ups and simulation to validate key design templates, core navigation flow and user experience with key target audiences/segments
- Test core design with representatives of target groups
- Develop a new, intuitive taxonomy, the more focus placed on organic search engine optimization efforts, the more likely you are to add quality copy to your website
- Create a standard web/mobile approach for the front-end access to digital services
- Develop a guide to aid future design and development of the website services to maintain best practice and consistency

The revised design of the website should also consider the future integration of online services which include electronic signatures, online payments, online document submissions, document management and customer portal access. In addition, the website or portal needs to be configured to allow for more self-serve functionality which includes tax calculators, online bookings, application submissions, permits and licences.

3.2 Hybrid Tools

The Town has implemented a hybrid work model. There is not a 'one-size-fits-all' solution as the demographic of in-person, remote, and hybrid roles varies among each business unit dependent on the services delivered. Employees cite the most common reasons for coming into the office is to access files or specialized equipment (e.g., printing), followed by in-person interactions with colleagues (meetings, connecting with co-workers), and having a space to concentrate on work. Customer service and service delivery has been impacted, as some customers are not yet familiar with the hybrid model. Customer expectations for in-person service creates implications for scheduling and staff in-person requirements.

To support service delivery in the hybrid working environment, the following best practices are identified:

- Streamline processes – up-to-date organizational process and procedures will aid employees in delivering consistent service, housing all documents with a knowledge management system
- Evaluate the technical tools used – promote real time and asynchronous collaboration through video conferencing, real-time chat, project management, and knowledge engagement tools
- Central source of information – provide a single, comprehensive source of information for all employees to reference
- Digitize all paper-based processes – make all information and processes digital to access across in-person and virtual settings, limiting the reliance on in-office tools

A well-defined hybrid work program provides employees clarity and confidence while working within a hybrid working model. The emergence of hybrid work has uncovered many benefits yet requires mindful considerations to mitigate risks. Risks such as ensuring collaboration across teams, promoting a cohesive company culture, or risk of higher incidences of employee burnout.

Employee hybrid best practices include:

- Develop a clear Hybrid Work Program and employee handbook that emphasizes the expectations, processes, and systems to support hybrid work
- Ensure all employees have access to the right technology, equipment, and software to work remotely
- Provide additional training on collaboration tools and policies to ensure compliance and proper use
- Focus on employee wellness through intentional employee listening, soliciting feedback, and increased one-on-one coaching

Hybrid Work in Service Delivery

Delivering services within a hybrid work model has implications for the processes, tools, and resources required to deliver services. The Town must move towards eliminating paper-based processes and digitization of services to ensure delivery is not limited to a physical location. Employees and customers need access to all necessary systems and tools to complete service requests at any time, regardless of location.

This has implications for many municipal processes / activities:

- Record or document storage and access – the Town currently does not have a centralized or digitized way to store and conveniently access documents
- Document review and approvals – there is difficulty sharing documents and streamlining / tracking review processes to retrieve sign-off
- Cross-functional access to information on shared tasks – limited insight on information or document tracking or status of customer interactions
- Customer consultations – there is a need to still connect with customers while working remotely and customer expectations for in-person service when they visit the Townhall

The current strategy outlines several initiatives to help address the above implications of hybrid working, such as the expanded use of AMANDA as a workflow management system (see pages 33 – 34), expansion of SharePoint as an ECM strategy (see pages 35 – 36), and the development of a virtual consultation initiative (see pages 15 – 16).

Hybrid Work Tools

The need for hybrid work tools that enable teams to manage collaborate and communicate efficiently while consistent service experiences is critical. The use and normalization of the hybrid work tools will assist in increasing communication and collaboration within the hybrid environment.

Consider the use and implementation of the following hybrid work tools:

- Hybrid scheduling – a scheduling tool is essential to keep colleagues up to date through scheduling team meetings, one-on-one's, time-off, and days in the workplace
- Desk & meeting booking – a meeting and room booking tool is helpful for employees planning their hybrid work week and employees to quickly view available desks and reserve a workstation for the days they're coming in
 - Note: desk booking is for hybrid roles only on an as needed basis (i.e., future growth); permanent in-person roles or roles that require specialized equipment may require permanent desk placements dependent on department / role
- Digital communication – communication tools are even more important in a virtual environment to allow for easier, more formal or frequent communication
- Virtual meeting tools – a high-quality virtual meeting software is essential to connect with team members and customers
- Virtual collaboration – virtual collaboration tools such as whiteboards help mimic the physical environment for brainstorming or research sessions

The Town currently uses MS Teams and SharePoint which are a great option for a hybrid scheduling, digital communication, and virtual meeting tool. Expanding the use of MS Teams across all departments and developing standard practice will increase the effectiveness of this tool. Furthermore, MS Teams can be leveraged to support scheduling of hybrid meetings through using the Microsoft Teams Rooms feature which allows for scheduling of specific meeting rooms.

Ultimately, these hybrid tools must be supported by standard practice exemplified by all employees. The success of the hybrid tools rests on the collective use and upkeep of best practice. The rollout of the hybrid work strategy and tools is to be accompanied by organization-wide training on standard use. As an example, every employee is required to maintain and update their calendar on an ongoing basis to promote ease of collaboration.

3.3 Customer Relationship Management (CRM) System

A CRM system enables municipalities to meet the needs of customers through the more efficient management of customer information. A CRM works by enabling the centralization of information, requests, and reports into one CRM database across all channels (in-person, phone, or digital) to be resolved or triaged to the appropriate department. This centralization also enables more robust data governance and reporting to better understand the usage and needs of customers.

A CRM system will enable the Town to improve customer service in the following ways:

- Improves service delivery – assists in automating most processes to limit human errors, manual or paper-based processes, and delays in service delivery
- Promotes transparency – enables citizens to apply for services and view the progress
- Promotes the use of technology – citizens and employees can access information digitally supporting hybrid work and self-serve options
- Increased productivity – eliminate manual tasks and streamlines interactions to reduce redundancy

There are many solutions and technologies to choose from, yet not all provide the same functionalities. It is essential to choose the right solution for your current and future needs to ensure the system can evolve with your business.

The right CRM solution rests on the following key decisions:

Cost	Consider budget for one-time / ongoing platform costs and IT resources to manage and support the platform.
Data Security	Choosing a solution that makes sure that customer data is secure, backed up and confidential.
Customer Profile	The need to have a single view of the customer across multiple services and integrate multiple systems.
Reporting	Requirements for reporting and tracking customer data. The Town’s limited reporting capacity hinders their ability to utilize data in decision-making, therefore, using a dynamic report or interactive dashboard will help management to gain visibility over trends, customer satisfaction, and KPIs to support decision-making.
Integration	To effectively leverage all technology platforms, consider which applications are needed to integrate with the CRM solution.
Workflows	To reduce bottlenecks and reliance on manual processes, automated workflows are required to trigger assignment, routing and re-routing of service requests to Town staff.
Focus on Customer Service	A fully integrated online experience for customers to fill out forms, communicate through email or phone, receive answers to common questions using an FAQ, and answer survey questions is required to reduce inefficiencies and enhance the overall customer service experience.

Enhanced internal communication	Internal communication between Town staff can be enhanced through a system that can tag and communicate with other divisions to collaborate on service requests and configure alerts to support time management.
Case management	To better manage the increasing level of service requests, a system is required to organize and track service requests by configurable business rules, view the status of work order completion, and edit work orders in the process.

Popular municipal management CRM functions typically include:

- Contact Management
- Citizen contact information, cases, renewals, payment history
- Self-serve portals for registration, profile management and ecommerce transactions
- Track individual and business licensing and renewals
- Manage committees, board members, and working groups
- Inbound and outbound citizen and business communications
- E-mail tracking
- Tracking of all correspondence
- Issue resolution and case management
- Track complaints, infractions, and other issues
- Build and maintain a knowledge base of issue resolutions
- Financial Systems Integration
- Link to financial systems for payment processing, renewals and statement of account
- Organization-wide access to reporting
- Allow for external access for renewals, payments, inquiries, licensing status, contact information
- Analysis and Reporting
- Dashboards, KPI metrics, 360-degree view, ad-hoc analysis, performance reports"

Choosing a CRM Solution

In selecting the optimal technology vendor for a CRM system, a detailed analysis of requirements is necessary. To effectively source the right CRM solution, it is recommended that the following process be undertaken:

Step 1: Understand Your Business Goals & Requirements

- Determine the specific business requirements or existing operational problems to address
- Set objectives and think about the pain points you want your new CRM to address
- Look at your yearly business performance reports and review the goals you've set for your company moving forward
- After identifying your goals think about the tools your team needs to reach them

Step 2: Gather Input from Various Teams & Departments

- Ask for feedback from all potential users so that you arrive at a decision that benefits the team as a whole
- Ask departments to provide their input to provide a comprehensive picture of how they will use the CRM

Step 3: Make a List of the Essential Features You Need

- Develop a CRM checklist of features you need in a CRM provider determining which features are essential and which ones are nice-to-have

Step 4: Decide on the Type of CRM Suitable for Your Business

- General-purpose CRMs offers universal sales, marketing, and customer service features that encompasses all business industries
- Industry-specific CRMs offer niche tools to help particular types of businesses, including insurance, healthcare, real estate, and hospitality

Step 5: Research the Best CRM Providers That Match Your Needs & Budget

- Research which CRM options on the market best meet your needs or prepare to go to market

Vendor Options

Dependent on current and future needs or constraints, the Town may leverage the existing technology systems or procure an additional software. The two options are detailed below.

Option 1: Leverage Existing Platform – AMANDA Software

The AMANDA Software is currently being utilized to track workflows and store data for select departments or processes. As is, the software is highly underutilized, and the functionalities can be expanded to meet the immediate customer relation management needs. The Town has in-house expertise on the AMANDA Software to support the implementation of this solution. AMANDA has the capabilities to provide CRM functionalities to support a centralized system:

- Track Customer Information – through the People Module AMANDA can input and track customer information and associate the customer with service tasks (e.g., applications, requests for service)
- Automate Workflows – AMANDA can automate workflows and automatically assign tasks to individuals or departments
- Customize Access to Information – depending on each user needs there is the ability to provide customized access to information per user (no access, view only access, editing access) and protect sensitive information
- Reporting Capabilities – built in reporting capabilities which include data visualization, dashboards, multiple user access to generate custom reports, or export data to other file formats
- Customer Facing Portal – options for expansion to build a customer-facing portal to facilitate self-serve tasks

Considerations / Requirements for implementation:

- The initiative must be led by all department leaders to accommodate the allocation of resources and changes necessary
- All centralized workflows must be streamlined, and process mapped prior to automation
- The Town has the in-house IT expertise on the AMANDA software to perform the AMANDA configurations, yet is dependent on current workload capacity and constraints (there are limited / insufficient resources to complete this work)

Option 2: Procure a CRM Software

There are many public sector CRM solutions that will offer customized, scalable solutions for customer relationship management. The following vendor comparison will explore three CRM solutions: Microsoft Dynamics, Salesforce, and Zoho.

Microsoft Dynamics CRM for Government

Microsoft Dynamics CRM is a complete relationship management solution that helps improve collaboration, communication, operational insight and overall efficiencies. Built on and accessed through familiar Microsoft technologies, it provides a flexible and affordable platform that gives government organizations a 360-degree view of citizens’ and constituents’ information and needs to resolve inquiries and issues quickly and easily. Microsoft Dynamics CRM automates and streamlines key tasks associated with citizen services, field inspections, case management, grants management, licensing and permitting and much more, thus empowering government organizations to meet their unique requirements and improve service delivery across all departments and functional areas.

Microsoft Dynamics CRM can help governments attain three key objectives:

- People-Centric Productivity
- Citizen Value Creation
- Government Cost Management

Salesforce

Salesforce provides an industry-specific CRM option. It enables clients to transform federal, provincial, municipal, healthcare, and utilities engagements with a platform that gives public servants a 360-degree view of citizens, stakeholders and partners. Streamline delivery, increase efficiency, and support innovation by taking a modular approach to public services.

- Implement instantly and see time to value and mission impact in days, not years
- Get a significant return on investment, with research showing 169% of total economic impact for case management solutions
- Deliver an improved level of service to create satisfaction and build trust in government
- Innovate to give employees the power of the latest applications, tools, insights, and capabilities

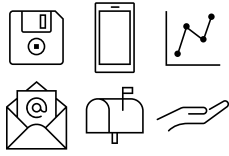
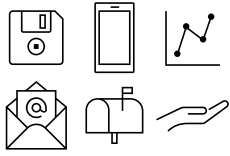
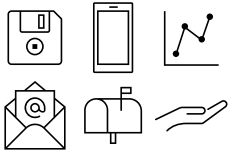



Zoho

Zoho is a customizable CRM solution that recognizes every industry is unique, with different customer expectations, unique business processes, distinct pieces of customer information to work with, and varying security and compliance requirements. By blending powerful features with in-depth customization, Zoho CRM helps businesses across all industries engage their customers meaningfully and optimize their sales operations, resulting in positive customer experiences and better revenue growth opportunities for every business.









The following chart provides a comparison of the proposed CRM solutions for Option 2.

	Microsoft	Salesforce	Zoho
Ideal for	Companies in need of a CRM solution with	Businesses looking for a platform that provides	Organizations that need a platform that’s equipped with

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	contract management capability.	forecasting, analytics and real-time updates.	permission- based security.
Business Size	Small & Medium	Small, Medium, & Large	Small, Medium, & Large
Cost	\$\$\$\$	\$\$\$\$	\$\$
Key Features			
Additional Features	<ul style="list-style-type: none"> • Audit changes to business data • Role-based access • Measure performance of organizations, business units, teams and individuals 	<ul style="list-style-type: none"> • Manage and track campaigns across multiple channels • Securely share files • Email and calendars • Real-time updates on contacts and account 	<ul style="list-style-type: none"> • Auto-assign leads with custom rules • Centralizes accounts, related contacts, and opportunities • Follow up on sales activities
Deployment			

Features & Deployment Legend

	Data Importing		Mobile Accessible
	Analytics		Email Marketing
	Email Integrations		Multichannel Support
	SaaS Platform		On-Premises Platform

Once You've Chosen your CRM Solution

Once you've established a CRM system and developed a technology landscape for the centralized model it is important to determine the impacts on the technology landscape. Considerations for this include:

- Undertake a Fit and Feasibility study to evaluate the current application infrastructure:
 - Evaluate the existing enterprise systems ability to support customer accounts, interaction history, customer experience profiles, workflows, status enablement, as well as utilize standard integration interfaces for data exchange
 - Undertake an Opportunity Assessment to establish technology and business options for future process and customer experience requirements

- Explore options for procurement of new applications or required services (i.e., hosted vs. hybrid vs. owned)
- Create a roadmap that is linked to the customer service transformation objectives
- Procure and migrate to the new architecture

3.4 Service Technology Recommendations

Service Technology recommendations seek to empower the Town to become more efficient and modernized in service delivery through the use of technology, digitization, and alternative working models.

IT Systems Transformation

2A: Expand AMANDA System Functionalities

Details	<p>Expand the use and functionalities of AMANDA system to support workflow management, customer tracking, and/or online services (use dependent on CRM solution).</p> <p>AMANDA can be leveraged for the following solutions:</p> <ol style="list-style-type: none"> 1. Workflow Management – expand use of AMANDA across additional departments as a workflow management and automation (see pages 39-40 for current and potential use cases) 2. Customer Online Portal – expand AMANDA functionality to deploy a Customer Online Portal (execution dependent on CRM solution) 3. Customer Relationship Management – leverage as Customer Relationship Management tool (see CRM Option one on pages 47-48)
Implementation Considerations	<ul style="list-style-type: none"> ● Additional resourcing may be required to implement and support on an on-going basis. <p>Workflow Management</p> <ul style="list-style-type: none"> ● Verify AMANDA use cases for additional departments and/or workflows to better track and automate existing processes ● Leverage process maps (Recommendation 1B) to determine workflow automations for the centralized model <p>Customer Online Portal</p> <ul style="list-style-type: none"> ● Leverage dedicated online services to build online portal (vendor delivered) <p>Customer Relationship Management</p> <ul style="list-style-type: none"> ● Determine in-house capabilities vs vendor-delivered needs to implement CRM (See pages 38 – 43 for details) ● AMANDA is a programable platform which requires in-house expertise to management ongoing maintenance and expansion
Expected Benefits	<ul style="list-style-type: none"> ● Increase workflow automation reducing the need for manual tasks and reducing human error ● Potential cost savings to leverage existing systems and in-house resources for online services and/or CRM solution
Cost / Delivery	<ul style="list-style-type: none"> ● One-time / Implementation Cost: \$25,000 - \$75,000

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	<ul style="list-style-type: none"> • Ongoing Cost: \$1,000 - \$5,000 • Delivery: Supported by Vendor
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2B: Upgrade Mitel Telephony Functionalities to Support Reporting and Analytic Needs

Details	Upgrade Mitel Telephony system to MiContact Center Business or comparable platform. This will enhance the telephony capabilities to enable omnichannel case management expansions and sophisticated analytics and reporting (including dashboards).
Implementation Considerations	<ul style="list-style-type: none"> • Develop new protocols aligned with service standards and centralized model workflows • Train all Service Halton Hills representatives on the system and tools • Determine roles / responsibilities for analytics and reporting • Additional resourcing may be required to implement and support on an on-going basis. • Detailed Cost / Benefit Analysis should be performed to validate if moving forward with this is desired.
Expected Benefits	<ul style="list-style-type: none"> • Advanced real-time dashboards and historical reporting to support performance measurement / tracking • Advanced call center features to support the immediate and future centralization needs
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$25,000 - \$75,000 • Ongoing Cost: \$1,000 - \$5,000 • Delivery: Supported by Vendor

2C: Develop an Enterprise Content Management (ECM) Strategy and Tools

Details	Develop an ECM strategy to define the processes and practices of collaboration and document management across the organization. Leverage SharePoint for document and information management for the centralized model and provide guidelines on best practice, governance, and use.
Implementation Considerations	<ul style="list-style-type: none"> • Develop organization-wide ECM strategy to identify the practices / policies, technology tools, and governance for collaboration and document management • Establish a common infrastructure for information, documents, and process operating procedures withing SharePoint • Configure access to provide Service Halton Hills the right access to department information based on Service Agreements (view only access, editing, etc.)
Expected Benefits	<ul style="list-style-type: none"> • Consistent use of systems / tools will enable easier collaboration and information sharing
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: *may incur costs if require external support • Ongoing Cost: N/A • Delivery: Supported by Vendor

2D: Redefine Website Architecture

Details	Redefine the website architecture to support service centralization and a streamlined user experience. Perform a review of all content and usage to eliminate outdated / redundant information and plan for revision of services to be incorporated into the centralized model.
Implementation Considerations	<ul style="list-style-type: none"> • Conduct a detailed review of current content and functionality to align with the centralized model by removing contact information for departments (based on Service Agreements) • Update website functionalities that are not fully functional (broken links, do not provide end-to-end services) or determine a plan for the removal of redundant services as centralization of services increases
Expected Benefits	<ul style="list-style-type: none"> • Reduce number of inquiries or requests into the Town through providing easier access to information online
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$1,000 - \$10,000 • Ongoing Cost: N/A • Delivery: Supported by Vendor

Hybrid Tools

2E: Develop Hybrid Working Model Processes and Procedures

Details	Determine hybrid working model policies and procedures. Provide organization-wide and targeted training on policy and tools ensuring high adoption of new practices.
Implementation Considerations	<ul style="list-style-type: none"> • Direct department leaders to assess hybrid working needs for specific business units, including soliciting employee ongoing feedback and assessing hybrid work environment • Determine and socialize hybrid working model policy and practices for the organization, including clear expectations for internal / external service delivery, virtual or hybrid collaboration, calendar maintenance and scheduling, and monitoring of employee experience risk factors (e.g., morale, burnout) • Ensure all roles have the appropriate hardware and software for hybrid work and plan to close gaps on the need to go to the office to access resources (e.g., printers) • Provide organization-wide training on hybrid work tools and FAQ to support hybrid work • Expand the use of MS Teams and SharePoint to align with organization-wide ECM strategy and centralized model
Expected Benefits	<ul style="list-style-type: none"> • Increased employee engagement, collaboration, and morale
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: *may incur costs if require external support • Ongoing Cost: N/A

	<ul style="list-style-type: none"> • Delivery: Completed In-House
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Customer Relationship Management (CRM) System

2F: Determine Customer Relationship Management (CRM) Solution

Details	Determine the most appropriate CRM solution for the municipality. Two options are presented to either leverage the existing AMANDA System as a CRM tool or procure an additional CRM solution.
Implementation Considerations	<ul style="list-style-type: none"> • Determine business needs and requirements for a CRM solution in collaboration with all departments / user groups. Develop a detailed list of ‘must have’ and ‘nice to have’ requirements to guide selection • Determine integration requirements with current and future technologies • Determine in-house capabilities and vendor-delivered needs
Expected Benefits	<ul style="list-style-type: none"> • Increased customer service efficiencies and customer satisfaction • Higher quality data and broader functionalities for reporting and analytics
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: \$50,000 - \$100,000+ • Ongoing Cost: \$1,000 - \$10,000 • Delivery: Supported by Vendor

Alignment of Recommendations

Cost & Efficiency recommendations uncovered within the Service Delivery Review are interconnected with the those that are defined within this Customer Service Strategy. It is expected that strategy recommendations may also drive cost and efficiency savings. To show how this can be the case, the following table outlines the alignment of these recommendations.

Note: Further details into Cost & Efficiency Recommendations can be found in the Service Delivery Review Summary Report.

#	Recommendation	Key Outcome	Strategy Focus-Area
2	Develop knowledge bank of updated roles / responsibilities for all staff that can be accessed and referenced easily within digital tools	Streamline Activities	Systems Transformation
5	Leverage AMANDA system or procure a new system to increase functionality to perform Customer Relationship Management (CRM) type capabilities (tracking of customer interaction information).	Streamline Activities	CRM System
6	Consolidate all Town Point-of-Sale (PoS) Systems to a single vendor to streamline financial administration activities	Streamline Activities	Systems Transformation
11	Modify IVR of telephony system to provide key services available to be completed (i.e., make a payment, obtain a permit, etc.). Remove the ability for direct contact into departments other than Service Halton Hills to reduce unnecessary call volumes across the organization.	Streamline Activities	Systems Transformation
12	Integrate online forms into existing systems to automatically capture and track the inquire and decrease the time / effort placed on employees to manually enter.	Streamline Activities	Systems Transformation

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17	Enhance Clerks system functionality to reduce the amount of manual intervention required from employees and increase the information sharing across roles.	Streamline Activities	Systems Transformation
24	Formalize AODA polices and reference tools. Include in update Document Management System.	Decrease Task Duplication	Systems Transformation - Updated Document Management System
26	Integrate additional permit / application processes into AMANDA (i.e., Business Renewal permits should be done in the same manor as Dog Licenses)	Streamline Activities	Systems Transformation
27	Provide frontline Service Halton Hills employees with access to view updated information about the status and details of enforcement complaints to streamline information sharing and responding to inquiries.	Streamline Activities	Systems Transformation
30	Digitize "approvals" processes to allow tracking of status and defining of deadlines to keep these activities moving forward during the desired turnaround time.	Streamline Activities	Systems Transformation
31	Modify current IT Systems to ensure Business, Environment & Culture teams as well as Parks & Recreations teams have access to the same up-to-date information that can be relayed to customer when inquiring	Decrease Task Duplication	Systems Transformation
33	Require consultation of IT team members in the discussions and planning of al potential IT purchasing	Mitigate Future Cost	Systems Transformation
35	Outsource property tax billing process to third party	Mitigate Future Cost	Systems Transformation
36	Enhance integration functionalities between key systems to reduce time / effort required tin manually reconcile financial information.	Decrease Task Duplication	Systems Transformation
38	Digitize permitting process to allow for electronic document management and communications for employees	Streamline Activities	Systems Transformation
46	Integrate third party information captured from After Hours service into AMANDA / CRM system.	Streamline Activities	CRM System
47	Prior to deploying centralized service model and technology infrastructure, savings can be achieved in the short-term by integrate social media channels into Public Works workflow management systems. This will remove work effort from Communications team members and allow for the department and employees to be responsible for managing this channel. This can also reduce the number of employees that are responsible or actioning the social media inquiry before getting to public works.	Decrease Task Duplication	Systems Transformation
48	Leverage existing Xplor system functionality and capacity to consolidate all Town Payments / Point-of-Sale (PoS) Systems to a single vendor to streamline financial reporting and administration activities.	Improve Service Experience	Systems Transformation

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51	Digitize and automate receipt generation process for customers utilizing Taxi / ActiVan services. Can also be made available online to decrease Town employee's effort for tis task.	Streamline Activities	Systems Transformation
53	Obtain a Document Management System to effectively store key Town records and formal collateral	Streamline Activities	Systems Transformation
63	Digitize the application process to allow for more efficient review tracking and communications to customers. Can also provide training sessions / tools for customers on the process.	Streamline Activities	Systems Transformation
66	Integration and increase in accessibility of planned new Emergency Response System and AMANDA System can support this increase in transparency and decrease amount of effort spent while collaborating with departments to complete the services.	Streamline Activities	Systems Transformation

4.0 Service Measures

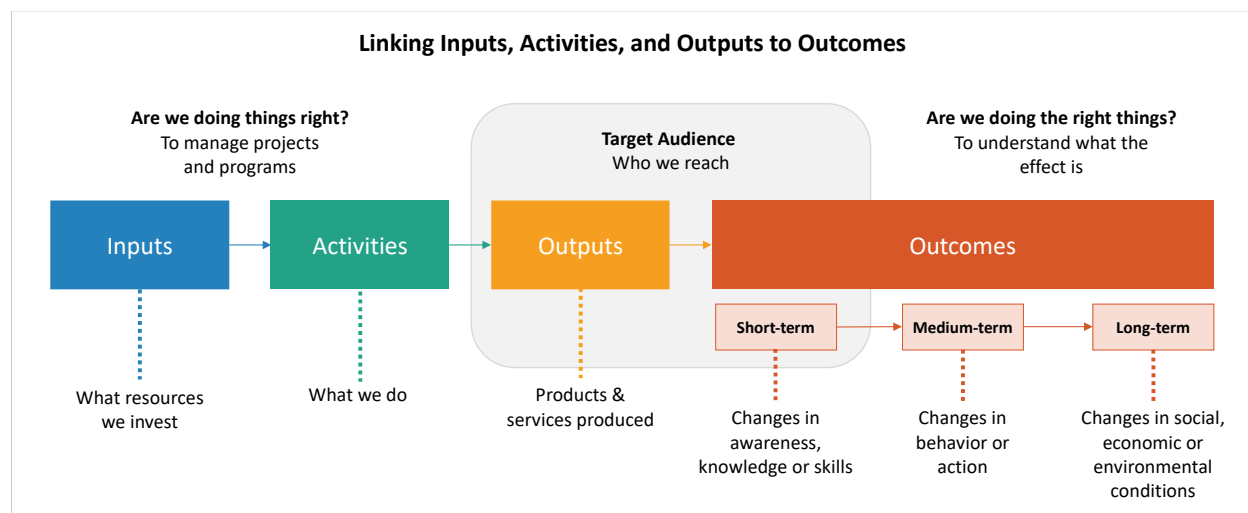
Effective performance management is essential to understand current performance and future improvements. Through both formal and informal processes, adequate measurement helps align employees, resources, and systems to meet their strategic objectives. Without having performance management and measurement systems implemented in the organization, there is a lack of key understanding. This impacts the direction of people, process, and technology initiatives to improve service delivery. Ultimately, organization success is dependent on the transparency and knowledge of what an organization chooses to measure.

The following section will detail three elements of Service Measures for Halton Hills: Performance Measures, Service Level Standards, and Support and Training Needs.

4.1 Performance Measures

A performance framework provides an overview of all the core measures used to determine how well an organization is functioning in relation to its stated goals and objectives. Halton Hills currently does not have a customer service-focused performance framework defined to track customer service goals and outcomes. Definition of a Customer Service Performance Framework and aligning governance is essential to assess how well a service has been delivered and how to improve its quality to increase customer satisfaction.

The purpose of the framework is to allow the Town to assess how well a service has been delivered through linking the inputs, activities, and outputs to organizational outcomes. The diagram below depicts the connections from inputs to outcomes. It serves as a roadmap to outline the activities the program will undertake and the outputs it intends to produce in achieving the expected outcomes.



The goal of a Customer Service Performance Measurement Framework is to provide a formal, objective process or system to systematically collect, analyze, deploy and report performance information. There is opportunity to use data better to track service levels and support a culture and framework of continuous improvement and innovation. The successful implementation of a more robust reporting framework would provide the Town with increased visibility, understanding, and oversight into services' performance and support better planning and resource management.

To help the Town track valuable service data, service performance measurements aligned to two categories should be collected at the organization level: 1) Operational Service Standards and 2) Customer Experience Metrics. The following key measurements are prioritized and should be incorporated into Centralized Services. Below is an outline of service standards Halton Hills should be collecting.

Operational Service Standards

Name	Description
FTR: First-Touch Resolution Rate	The number of tickets / cases / inquiries that are handled and “resolved / closed” by the first agent during their first interaction.
ART: Average Resolution Time	The total time that is taken by the support team to solve the issue once it is looked upon.
IPR: Interactions Per Resolution	The number of interactions the support agent and the customer have about a single issue before coming to a resolution.
FRT: First-Response Time	The time it takes from when a customer makes a request to the time an agent "picks up / opens" the ticket / case / inquiry.
AIT: Average Idle Time	The time a ticket / case / inquiry spends in some form of an “open status”, not including any waiting for the customer to respond.
ABR: Abandon Rate	The number of calls “abandoned / hung-up” while a customer was waiting on hold to connect with a human agent.

Customer Experience Metrics

Name	Description
NPS: Net-Promoter Score	Measures the level of loyalty customers feel towards the organization by uncovering how likely they are to recommend to someone else
CSAT: Customer Satisfaction Score	Measures the general positivity / satisfaction customers have with the organization as a whole or any individual aspect
CES: Customer Effort Score	Measures the level of effort / simplicity customers experience when interacting with the organization or services
CIP: Customer Interaction Preferences	Measures the general preferences customers have when interacting with the organization and /or services (i.e., what channels they use, when they interact, what they want to complete, what the value)

For a comprehensive list of KPIs used by comparable municipalities see Appendix V.

Characteristics of Leading Performance Measures

Defining useful KPIs requires consideration of multiple facets. Well-designed KPIs are:

- **Influenceable:** A KPI should not be affected by events that cannot be controlled by its owner
 - **Example:** Average time to request resolution
- **Objective:** Subjective KPIs can be influenced by perception of the rater and not controllable by the owner
 - **Example:** Time to resolution: 3 days

- **Narrow in Scope:** A KPI should address a single variable or a set of inseparable variables. Composite indices should be used with caution
 - **Example:** Average time to connect to an agent
- **Outcome-driven:** A KPI should be reflective of the desired outcome and not merely provide a count
 - **Example:** Average time to address customer inquiry
- **Consistent:** Variables which fluctuate can obscure real changes in the KPI
 - **Example:** Customer calls by issues type per day
- **Timely:** KPIs must be measurable in a time frame that allows for changes to be addressed in real time, usually daily and sometimes weekly
 - **Example:** Customer complaint identification to resolution time (weekly average)
- **Simple:** Complex equations used to isolate individual variables leave people uncertain about how to address KPIs
 - **Example:** 90% of service requests resolved within 15 Days
- **Avoid undesirable outcomes:** Incentivizing improvement of a single KPI without consideration for others could cause broader harm
 - **Example:** Time to successful resolution
- **Minimal in Number:** No more than 10, and preferably fewer KPIs should be created, at each level/area of the organization. They are after all Key indicators and too many can cloud the clarity of monitoring.

Data Requirements

High quality data is crucial in ensuring the creation of reliable KPIs. Low quality data can distort KPIs, create unfair biases, or facilitate poor decision making. Available and timely data is a key requirement in the creation of strong KPIs.

Data Characteristic	Explanation
Reliable	Data can be replicated by independent observers to produce similar results
Valid	The data is representative of the event/action it represents
Relevant	Timely and available data is relevant. As data ages, it loses its relevance to the present state. Some data may be difficult to capture
Fair	Data, especially subjective data, can be biased based on the observer, the recording/observation method, or the interpretation method. Bias may occur when information is chosen with particular interests, economic, or political objectives in mind. Omission of key information is a form of bias

Comparable	Data can be used to assess measures against other data (past vs. present, Department to Department, benchmarks, etc.)
Consistent	Data is prepared on a consistent basis, or differences between information are clearly articulated
Understandable	Narratives in plain, non-technical language about the data’s origin, calculation, and measurement method can help a user understand its usefulness and limitations

Data Systems

Metrics that are required to develop KPIs may not be tracked by all systems. For example, time to complete a task may not be measured in standard enterprise systems. When designing a KPI you need to consider the input and output of data and how it will be captured and reported. This may require changes to existing systems or additional systems to be implemented to enable KPI development. Data systems should be used to allow for simple capture, storage and validation of data. The requirements of underlying data that are outlined above need to be captured by the system or the KPI may be invalid.

A common example in Municipalities is having the customer service agents manually track service requests in a manual spreadsheet. This sounds like a good way to gain an understanding of the KPIs involved in request resolutions. This issue is that the person being measured is now also tracking the data, it is very time consuming to fill it out, it takes further time to go back to show the resolution is closed, the resolution solution may not be known if it was routed to a department and there is no easy reporting of the information.

Upgrading the Mitel Telephony system will enable the expansion of metric tracking, reporting, and data visualization. This upgrade is a key enabler to be able to efficiently track and access performance and service metrics.

Voice of the Customer

In the long-term, the Town should build a “Voice-of-the-Customer” Program which is the formalized way that an organization gathers customer feedback, analyzes, and actions what is uncovered to make service experience improvements. Deploying an organization wide VoC program will require defining customer personas, developing customer journey maps, identifying a comprehensive list of KPI’s / metrics aligned to organizational goals, identified listening posts for when / how to capture feedback and a robust technology system to support the capture, analysis and reposting of data.

4.2 Service Level Standards

Both service standards and service level agreements are methods used by service providers to ensure consistency of service. Service standards are useful for setting expectations with external and internal customers and colleagues, ensuring consistency of service, providing a standard to measure against, and encourage service improvements. Service standards are the operational standards that service providers commit to providing their customers - they specify what the customer can expect and when. These expectations serve as indicators that will allow the Town to measure customer satisfaction, such as availability, professionalism, promptness, accessibility, credibility, courtesy, reliability, safety, etc. (what

the customer wants). Service levels are defined by what the customer receives and / or the outcomes. These customer outcomes are measured by the performance of assets, and by activities that support the service and the assets.

Common parameters within service levels may include any of the following:

- Safety, customer satisfaction, quality, quantity, capacity, reliability, responsiveness, environmental acceptability, cost, and availability.
- The levels of service can be any combination of the above. It is important that they align with what is deemed a priority by each unique municipality / region.

Levels of service is therefore a balance of the cost, risk and benefits of the services being provided. This is based on the performance of the assets, and of the activities supporting the assets and delivering the services.

Service Levels are used by municipal leaders to:

- Assist and support decision making, and investment planning related to planning, development, operation, maintenance, rehabilitation, and replacement of municipal infrastructure.
- Promote good practice, sustainable development, and environmental stewardship.
- Facilitate community involvement and a public sense of ownership and incorporate community values.

The benefits in achieving and maintaining levels of service include health and safety, physical/natural development, economic/social development, quality of life/living standards and reducing life cycle cost.

How to Determine Service Levels

Due to limited availability of baseline data, the Town currently is not equipped to determine Service Level Standards.

Having a Service-Level framework is a methodology that is used to determine what kind of service truly meets the wants and needs of customers, while still being manageable by service providers. It is knowing what levels of service customers expect, and what they are willing to pay for. Understanding customer expectations for the service and the assets that support them is an important part of determining appropriate service levels.

Service level standards will not be consistent across every service or business unit; they may vary due to complexity, length, and urgency of desired outcome. When determining service standards, first step is to establish the needs of the customer or outcomes of the services provided. Setting the service standard level cannot be determined arbitrarily, but based upon multiple factors such as available resources, variable lag times, staff skills and capabilities, or process changes.

Defining levels of service is unique for each municipality / region and requires the individual organization to determine what is “just right” for their operations and customer landscape. Effective service levels neither “overdeliver” nor “underdeliver” and are accurately defined by collecting data overtime to gauge what level fits this “just right” window for the organization.

Comparing service levels to similar municipalities / regions can be a good start to targeting a range for levels but is not recommended to be copied as the uniqueness of each individual organization requires a unique set of service levels.

Examples of Customer Service Standards

Typical categories the Town should develop customer service standards for include:

1. Accessibility Standards

- Define when service delivery is available (e.g., hours of operation)
- Process to provide information upon request
- Languages customers can be served in
- Channels customers can be served across

2. Availability Standards

- Call answer times / speed (number of rings / wait times)
- Confirmation of emails / messages
- Time to process a request
- Time to answer general communications (by channel)

3. Reliability Standards

- Policy to inform customers of changes
- Ensuring all information is up-to-date and accurate
- Ensure clarity and precision of documents, forms, instructions, as well as graphic and written communication

4. Safety Standards

- Customers are guaranteed:
- Respect and protection of confidentiality of personal information.
- Encryption during electronic transactions.
- Personnel identification (uniforms, badges, business cards).

5. Courtesy Standards

- Call transfer policy (e.g., only transfer calls when first contact resolution is not possible)
- Punctuality guarantees
- Customer greetings / how to address (e.g., proper use of pronouns)

From a qualitative perspective, the Town can define high-level service standards for in-person and telephone interactions. Examples of these standards are illustrated below:

In-Person Standards

Every interaction and service encounter is important. Greeting and responding to people while showing genuine interest in their problem shows others that service excellence and service delivery is a top priority of the municipality.

- Offer assistance promptly and pleasantly
- Smile and establish eye contact
- Project a friendly, enthusiastic and professional attitude
- Focus your attention on the customer and avoid being distracted by the phone or other conversations
- Speak to the person as you would like to be spoken to
- If you are unable to answer their question directly, refer them to someone who can or seek to find the solution yourself and get back to the customer

Telephone Standards

Telephone interactions include those conducted over landlines as well as mobile devices. The Town should strive to make every customer interaction a positive and productive one. The first few moments of a phone call make a powerful first impression and demonstrate how important service excellence and the customer experience is to the municipality.

- Respond promptly and pleasantly
- Project a friendly, enthusiastic and professional attitude
- Answer every phone call by the third or fourth ring
- Identify yourself and your division
- Take ownership of the call. Listen for content, defer personal judgement and concentrate on the main issue. Answer questions or find out who can answer the questions.
- Ask the caller if they received the information they requested and if there is anything else you can do for them
- Let the caller hang up first

Comparable Municipal Customer Service Standards

Comparable municipal customer service standards can provide insight into best practice and customer expectations for great service. Considering other municipal standards can be a helpful input while determining service levels to achieve. This is taking an achievement-based approach to setting standards, whereas resources, processes, and offerings will need to be modified or enhanced to meet expectations.

The following chart provides the Customer Service Standards for the Town of Oakville, ON.

Channel	Customer Service Standards
Telephone/voice mail	<ul style="list-style-type: none"> • Answer calls within three rings • Update voice mail with an informative message daily • Check voice mail daily, unless there is an extended absence notification • Provide an alternate contact on voice mail • If alternate contact is a department line, ensure the voice mail has been updated with the date and response time • Senior management voice mail should be directed to a live person • Respond to high priority (related to non-emergency public safety) voice mail within one business day • Respond to voice mail by end of next business day
Written correspondence (emails, letters, memos, faxes, etc.)	<ul style="list-style-type: none"> • Respond to email by end of next business day • Respond to high priority (related to non-emergency public safety) emails within one business day • Ensure automatic or same business day acknowledgments for high volume areas or when unable to respond fully within the required amount of time. Provide a response time estimate based on the complexity of the inquiry and availability of staff. Total time should not exceed 15 business days • Respond to faxes, letters and memos within 15 business days of receipt
In person	<ul style="list-style-type: none"> • Attend to walk-in customers immediately • Serve customers in the order in which they appear, except when a customer has a scheduled appointment

After-hours inquiries	<ul style="list-style-type: none"> All after-hours high priority or public safety issues should be directed to the town’s after-hours emergencies call handling service. To maintain work/life balance, respond to general inquiries received during non-business hours (evenings, Saturdays, Sundays, and statutory holidays) within two business days of the next business day.
Response times	<ul style="list-style-type: none"> If unable to respond fully within the required amount of time, provide a response time estimate based on the complexity of the inquiry and availability of staff. Total time should not exceed 15 business days.

How to Audit Service Levels

Service-Levels will often evolve alongside changes to the municipal / region operations and customer landscape. Effective management of service levels require formal “check-ins” that can be done on an annual basis to review and revise. Like defining service levels, these audits of existing service levels look to understand how well the levels identify if the service is “just right” in its delivery or if it is “over / under” delivering based on the defined level. When auditing service levels, it is important to address the following key questions.

- Have there been any changes to the Strategic Priorities?
- Are we consistently under or over performing on the level?
- Have there been changes to customer needs and wants?
- Have there been major fluctuations to financial constraints to meet the level?
- Are there any new or potential risks associated with meeting the level

4.3 Support & Training Needs

To support the desired customer experience and service standards it is recommended that the Town develop comprehensive customer service training for all customer-facing staff to ensure service delivery is consistent. Training is also critical to ensure a centralized service delivery model can be deployed effectively.

The Customer Service Training architecture should follow this format:

1. Desired Customer Experience: Define customer needs and expectations
2. Standards: Define desired customer service standards and requirements to meet service standards aligned to roles and expectations
3. Competencies and Behaviours: Define the desired competencies and behaviours required to achieve process and service standards
4. Process Maps: Define and illustrate the process and ensure alignment to service standards
5. Procedure / Work Instruction: Detail how staff should perform steps in the process and ensure alignment to experience and service standards
6. Tools and Templates: Develop the tools and templates required to support the process and the customer experience

Types of Customer Service Training

Within each interaction, Halton Hills customer service representatives must be equipped with the right knowledge and skills. To develop the right competencies both functional and skills-based training is essential.

Customer service training should include:

- **Process Training** – documented processes and workflows to complete service delivery in a centralized model. This should be aligned to Service Level Agreements established with all departments and role expectations for customer service representatives
- **Product / service training** – overview of all services and products offered by the Town and where and how to direct customers to find additional information
- **Customer support software training** - technical training on all software programs to deliver service (e.g., CRM (AMANDA), Mitel, SharePoint, Great Plains, CityWide, Active Citizen Requests, Web FOCUS and Vailtech). System training should align to the roles and responsibility of the customer service representative (e.g., system view access to provide status updates versus complete a transaction).
- **Soft-skills training** – customer service softs skills training focused on elevating the delivery of exceptional customer service
- **Consistent monitoring and assessments** – real-time and scheduled coaching and feedback sessions to support professional development

Training for Centralized Service Delivery

To effectively deploy the centralized customer service model, the Town should create standardized support / training tailored for the centralized structure of services and activities. Training should be designed to educate service employees on the scope of customer interactions they are required to manage and what interactions can be escalated. The objective is to adequately train employees on job scope to reduce escalations and transfers.

Support materials which should be included within the training are:

- Organizational “Triage-Tree”: Visual diagram of the organizational structure that outlines key information from Service Agreements to support employees with knowing where, when, and how to transfer calls
- Common FAQ’s: List of customer frequently asked questions that employees can access.
- Service Delivery Job Aids: Reference guides of key procedures / activities performed by employees to complete services

Customer Service Training Across the Employee Lifecycle

Acquiring and maintaining organizational knowledge is not something that has a beginning and an ending. It is a continuous process. Over time as employees advance within your organization and the organization takes on new changes, employees need to be equipped. A comprehensive training plan for the Town of Halton Hills should addresses the varying training needs across this spectrum. Three stages are described below: (1) New Hire or Onboarding Training, (2) Ongoing Customer Service Training, and (3) Time-Sensitive Customer Service Training.

New Hire or Onboarding Training

On-boarding is more than merely conducting an employee orientation. It is the process by which new employees acquire the skills, knowledge, and behaviors that will permit them to become effective contributors within an organization. New hire or onboarding training for a new role must focus on the tactical and technical skills for the role, as well as the soft skills to be successful in the role.

Ongoing Customer Service Training

Employees will continue to learn, develop, and grow throughout their tenure with your organization. So naturally, it’s important to provide them will tools and resources to support them. Regular on-going

training is a great way to keep customer service representatives engaged and supported within their roles. Two types of ongoing training can be offered:

- Skill Development or Competence Check-in: Developing new skills and abilities, as well as updating existing knowledge will be continuously required just to keep pace with new developments in technology as well as new processes and procedures
- Team Building: Team learning can enhance the culture and engagement of teams. Single or multi-day team training can help get employees aligned.

Time-Sensitive Customer Service Training

Organizations are always managing change. The customer service team will be the first point of contact for customer questions or concerns. Training customer service on the appropriate response to emergencies or organization changes is an imperative change management tool.

- Emergency Training: In the event of emergency ensure the customer service team is trained on how to respond.
- Service or Organization Updates: Ad-hoc training on service or policy updates so that the customer service team is equipped to handle customer questions or concerns.

Customer Service Training Best Practice

As you develop your customer service training, consider the following best practices to ensure lasting and effective impacts.

<p>Collaborate to Build Relevant Content</p>	<p>Collaborate with Human Resources to leverage existing training collateral on service delivery.</p> <p>Co-develop content for materials / guides with appropriate department subject experts</p> <p>Validate learning content with SMEs and departments to ensure accuracy and relevancy.</p>
<p>Build an Online Repository of Training Content</p>	<p>Ensure all employees have access to customer service training and support tools. A few key tips include:</p> <p><i>Limit access:</i> Training materials can include business-sensitive information. Make sure only the right people in your team can access this information.</p> <p><i>Make it search-friendly:</i> Make your internal knowledge base search-friendly so that employees can easily locate the customer service training manual or other documents.</p> <p><i>Update content regularly:</i> As your product or service changes over time, you must update your training material accordingly. Whenever there is any significant update in content, make sure your agents are notified about the same.</p>

<p>Encourage Peer-to-Peer Training</p>	<p>Peer-to-peer learning is a great way to tap into the experience and knowledge of those who are already working in your team. Here are some ways to facilitate and encourage peer training:</p> <p><i>Create a peer coaching program:</i> A peer coaching program will help existing employees welcome and help new hires. They can give new hires an office tour, assist them while taking customer calls, and introduce to your customer service training materials.</p> <p><i>Identify subject matter experts:</i> For successful training, identify subject matter experts who can train their peers. For example, if someone is an expert at handling technical issues, they can train other team members on the same. SMEs can also help you review and update your training content.</p>
<p>Track Progress Using KPIs</p>	<p>Track relevant customer service KPIs related to the customer service team.</p> <p><i>After technical, product, or process training:</i> Representatives are in a better position to quickly resolve customer issues. Look at the number of pending tickets with an agent and the number of tickets they have successfully resolved.</p> <p><i>After soft skills training:</i> To measure the quality of customer service interactions you can ask for customer ratings. Low ratings can highlight room for further improvement.</p>

See Appendix VI for CSPN’s Customer Service Training Courses and Landscape.

Customer Service-Related Policies

Customer service policies are written codes of conduct that give employees guidelines to follow in various service scenarios. Written policies are put in place to inform employees of customer service processes and the appropriate steps to take in certain situations. These policies are unique to your organization and should be developed in alignment with your overall customer service strategy, vision, service standards, and relevant industry regulations or best practice. Often, these policies are socialized with the public to ensure the policies are being upheld.

Policies are vital to operations because they:

1. Keep service representatives and the public on the same page: Customer service policies keep everyone on the same page. When a situation arises, the policy dictates the appropriate level of action.
2. Enable consistent support: The policies tell customers what they can expect and ensure consistent support across all service channels
3. Set important benchmarks in stone: Customer service policies also include the standards of service to be met, with important benchmarks and metrics.
4. Help you provide better support: Customer service policies are carefully curated based on a company’s capacity to do things. They eliminate any disagreement on what it means to provide good customer service.

Policies creation is not a one-size-fits all, but should include some of the following elements:

Mission Statement / Purpose	Reminder and guiding force for the customer service team. It is a goal that states how your business wants to interact with customers.
Service Overview	Provide an overview of the service offered. You can also add links to other documents, demo videos, and brochures that can be reviewed by customer service employees.
Service Standards	Articulate the service standards aligned to the service delivered and specify what the customer can expect and when.
Guidelines for Problem Solving	<p>Create a set of guidelines that can be referred for quick, easy problem solving, such as:</p> <ul style="list-style-type: none"> • Understanding the problem – letting the customer speak, taking relevant notes, and repeating what you understand to be the issue. • Understanding the cause of the problem – what should have happened that did not? Remember, it is best to choose problem resolution over blame games. • Offering solutions – suggest a way to fix the problem and see if the customer agrees or has a resolution of their own. All stakeholders should work together to come up with an answer. • Solving the problem – take action and fix the issue. Make sure the customer is happy with the solution.

Aligned to the Customer Service Strategy, suggested policies to be developed include:

- Corporate Customer Service Standards Policy (critical overarching policy)
- Corporate Complaint Handling Policy
- Handling of Unreasonable Customer Behaviour

4.4 Service Measures Recommendations

Service Measures recommendations seek to define customer service performance measures and service level standards to support a culture and framework of continuous improvement and innovation.

Performance Measurement Recommendations

3A: Develop Customer Service Performance Measurement Framework

Details	Determine a Customer Service Performance Measurement Framework aligned with the strategic customer service goals and desired outcomes. Identify customer service metrics to assess desired outcomes for Service Halton Hills. Determine how results will be collected, analysed, and communicated.
Implementation Considerations	<ul style="list-style-type: none"> • Confirm customer service metrics to be used aligned with the organizations' strategic customer service goals • Encourage stakeholder participation from the beginning of the process so they understand the efforts being made to achieve results. Proactively create gap resolutions to describe feedback and how the organization can be proactive in addressing it

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	<ul style="list-style-type: none"> • Collaborate with IT to plan design of required systems integrated for data collection (Mitel Telephony upgrade) • Design critical and thoughtful dashboards to communicate important results and present them in a way that they are easy to understand • Determine roles responsible for data analytics and reporting, such as creation of dashboards or cadence of reporting / review cycles
Expected Benefits	<ul style="list-style-type: none"> • Increased insight to determine drivers of great service and identify areas of improvement
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: <i>*may incur costs if require external support</i> • Ongoing Cost: N/A • Delivery: Completed In-House

3B: Develop Data Governance, Management and Reporting Framework

Details	Identify the systems, processes, and roles responsible for data governance and reporting for the performance management framework. Determine the cadence and reporting needs aligned with performance management needs.
Implementation Considerations	<ul style="list-style-type: none"> • Identify the systems which data / metrics will be tracked and retrieved from - Consider expansion of the Mitel Telephony system to support data tracking and reporting needs • Determine how data will be used and reported on (real-time vs. batch reporting) and build data visualization tools, such as dashboards or reporting templates • Identify the roles and responsibilities for data accessing, analysis, and reporting
Expected Benefits	<ul style="list-style-type: none"> • Increased ease of reporting capabilities, including real-time insight into key metrics
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: N/A • Ongoing Cost: \$50k - \$75k (if Business Analyst resource is desired) • Delivery: Completed In-House

Service Level Standards Recommendations

3C: Determine Department Service Levels

Details	Determine service level objectives and metrics to assess customer service and service delivery. Align service level objectives to municipal standards and customer expectations. Monitor service levels to identify adjustments as needed.
Implementation Considerations	<ul style="list-style-type: none"> • Determine service level categories to be measured and collect baseline data • Decide on target standards taking into consideration municipal standards, workforce / resources, changes to processes, and customer preference
Expected Benefits	<ul style="list-style-type: none"> • Increased role and expectation clarity for customer service roles

Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: <i>*may incur costs if require external support</i> • Ongoing Cost: N/A • Delivery: Completed In-House
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Support & Training Needs Recommendations

3D: Develop Customer Service Training Framework for Customer Service Roles

Details	<p>Every frontline customer service member should have similar skills and knowledge with the ability to complete all centralized services. It is recommended to develop service specific training and deliver to the full team. Suggested training curriculum includes:</p> <p>(1) Soft skills and knowledge focused on building rapport, handling difficult situations, active listening / communication, and how to show empathy.</p> <p>(2) Tactical skills and knowledge of all centralized services delivered, employees / processes within departments, and service systems / tools required.</p>
Implementation Considerations	<ul style="list-style-type: none"> • Identify Team Member skills, competencies, and knowledge gaps to design tailored training. Opportunity to leverage this activity to train other employees across departments • Develop Service training curriculum and facilitate training sessions for Team Members. Leverage external consultants with expertise in Municipal service training design and delivery
Expected Benefits	<ul style="list-style-type: none"> • Improve the quality of customer service delivered through consistent and knowledgeable service delivery
Cost / Delivery	<ul style="list-style-type: none"> • One-time / Implementation Cost: N/A • Ongoing Cost: \$5,000 - \$10,000 • Delivery: Supported by Vendor

Alignment of Recommendations

Cost & Efficiency recommendations uncovered within the Service Delivery Review are interconnected with the those that are defined within this Customer Service Strategy. It is expected that strategy recommendations may also drive cost and efficiency savings. To show how this can be the case, the following table outlines the alignment of these recommendations.

Note: Further details into Cost & Efficiency Recommendations can be found in the Service Delivery Review Summary Report.

#	Recommendation	Key Outcome	Strategy Focus-Area
1	Provide continuous training to appropriate employees on technical skills relating to the use and execution of service activities being completed.	Decrease Task Duplication	Employee Training
4	Hire a Business Analyst role to be responsible for organizational data capture, organization, analysis and reporting. This will be	Mitigate Future Cost	Employee Training

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	increasingly important as the Town looks to increase its capture and measure service-related data / information.		
9	Define service standards that are realistic and achievable. Promote these externally to the community to ensure there is alignment in expectations	Improve Service Experience	Service Standards
13	Define escalation process for who is involved and the activities to be completed so that only those that need to be involved are included.	Decrease Task Duplication	Service Standards
22	Update policy to ensure there are clear requirements for what types of communications content is required to be reviewed by the Communications team and expectations for turnaround times.	Streamline Activities	Service Level Standards
23	Update policy to require use of this system and process when asking for website changes to decrease the strain on team employees.	Streamline Activities	Service Level Standards
25	Define team / employee role responsibilities to have distinct processes that each are required to complete and how the transfer of responsibility needs to take place.	Decrease Task Duplication	Employee Training
42	Cross-train team employees so more capacity can be devoted to these activities or update job descriptions, so it is a part of more team members role.	Improve Service Experience	Employee Training
56	Define service standards that are realistic and achievable. Incorporate these into performance measurements for employees to be able to track and ensure they are being met. Create singular service standards, measures and training that can be deployed across all facilities and across all departments.	Improve Service Experience	Service Standards
62	Develop clear guidelines and policies that outline the engagement that stakeholder groups will have in the consultation process. Allow for feedback and input from stakeholders to ensure they are included in this process.	Improve Service Experience	Service Standards

5.0 Governance & Implementation Planning

The current report has outlined many elements and initiatives to reach the overarching goals of service centralization and modernization of service delivery. There are many interconnected recommendations that are dependent on two key decisions:

1. The development of the type, maturity, and sophistication of the centralized model
2. The decision of the Customer Relation Management Solution

These two decisions will influence many of the subsequent recommendations in terms of breadth and timing.

5.1 Governance

A strong and clear project governance is necessary to ensure execution of the centralized service model has a successful outcome. The table below outlines the various project roles and responsible functions required to support the implementation of the recommendations.

Role	Members	Functions
Sponsor	<ul style="list-style-type: none"> • CAO 	Executive Sponsorship
Steering Committee	<ul style="list-style-type: none"> • Senior Management Team (SMT) • Strategic Initiatives Department 	Leadership Support Decision Making Deliverable Approval Performance Management
Implementation Team	<ul style="list-style-type: none"> • Department and Business Unit Management • Department and Business Unit Subject Matter Experts <p><i>*Specific stakeholders are dependent on the recommendation</i></p>	Project Management Risk Management Financial Management Project Communications Deliverables (as described in recommendations)
IT Build and Support	<ul style="list-style-type: none"> • IT Vendors • IT Department (internal) • Business Analyst (Recommended Addition) * 	Co-Define Build Requirements Manage IT Build Aligned to Service Requirements Provide IT Guidance / Training (including analysis of AMANDA system)

*Business Analyst role currently does not exist. Service Delivery Recommendation is to hire a Business Analyst role to be responsible for organizational data capture, organization, analysis, and reporting.

5.2 High-Level Workplan

The following workplan provides a phased approach to service centralization and modernization. High-level timelines and cost are provided to guide the prioritization of recommendations. There are many factors influencing the timing and cost of the recommendations. Implementation / timing dependencies have been identified and noted below.

ID	Phased Recommendation	Short-Term (1 - 3 Years)			Medium-Term (3 - 5 Years)			Long-Term (5+ Years)			Estimated Cost
Stage 1: Preparation											
1A	Design a Centralized Service Delivery Model										One-Time: \$25k - \$50k
2F	Determine Customer Relationship Management Solution										One-Time: \$50k - \$100k+ Ongoing: \$1k - \$10k
1E	Develop Change Management and Communications Plan										\$0 *may incur costs if require external support
2C	Develop an Enterprise Content Management (ECM) Strategy and Tools										\$0 *may incur costs if require external support
1B	Develop Department Service Agreements & Processes										\$0 *may incur costs if require external support
1C	Develop Centralization Service Resource Model										\$0 *may incur costs if require external support
1D	Integrate Technology Systems Required for a Centralized Service Delivery Model										One-Time: \$25k - \$50k Ongoing: *may incur costs if require additional IT resource
1F	Design & Build Customer Service Desks to Support the Centralized Model										One-Time: \$10k - \$25k
2E	Develop Hybrid Working Model Processes and Procedures										\$0 *may incur costs if require external support

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Stage 2: Initiation													
2A	Expand AMANDA System Functionalities												One-Time: \$25k - \$100k Ongoing: *may incur costs if require additional IT resource
2B	Expand Mitel Telephony Functionalities to Support Reporting and Analytic Needs												One-Time: \$25k - \$75k Ongoing: \$1k - \$5k
2D	Redefine Website Architecture												One-Time: \$1k - \$10k
1I	Expand Online Self-Serve Functionality												One-Time: \$10k - \$50k
3A	Develop Customer Service Performance Measurement Framework												\$0 *may incur costs if require external support
3B	Develop Data Governance, Management and Reporting Framework												One-Time: \$0 Ongoing: \$50k - \$75k (if Business Analyst resource is desired)
3C	Determine Department Service Levels / Standards												\$0 *may incur costs if require external support
3D	Develop Customer Service Training Framework for Customer Service Roles												Ongoing: \$5k - \$10k
Stage 3: Expansion													
J1	Develop Comprehensive Customer Online Service Portal												One-Time: \$25k - \$75k Ongoing: \$1k - \$5k
1G	Develop Virtual Consultation Initiative Design and Implementation												\$10k - \$50k
1H	Develop Multi-Facility Self-Serve Kiosk Design and Implementation												One-Time: \$1k - \$5k

Timing Dependencies

The chart below displays the timing dependencies to take into consideration for the implementation.

ID	Details
1A / 2F	The deployment of the CRM solution should align with the implementation of the centralized model as the CRM will support the model.
1A / 2C	The ECM strategy should be built in alignment with and to support the centralized model.
1E	Build and deployment of customer service desks will align with the timing of the Townhall Masterplan.
2A / 2F / 1B	The expansion of functionalities of the AMANDA system is highly dependent on the CRM solution chosen and the necessary integrations determined by Service Agreements.
1I / 2F	The development of the Online Service Portal will be influenced by which CRM solution is chosen.

5.3 Change Management

Effective change management aligns leaders and staff around change that is clearly defined, justified and well-communicated. The following change management structure will aid the Town in ensuring internal and external stakeholders are ready, willing and able to implement change.

1. **Prepare the Organization for Change:** Before successfully implementing change, the organization must not only be prepared logistically, but culturally as well. Ensure top-down buy-in from leadership and that they understand and are committed to the importance of the initiatives. Develop and implement detailed communications that clearly articulates the reason for the change to each stakeholder group. Consider identifying champions in each department to help spread the message. Ensure approval of this report and its roadmap is widely communicated.
2. **Craft a Vision and Plan for Change:** Once the change is understood and agreed upon, clearly define the strategic goals, stakeholder roles and responsibilities, and how success will be determined.
3. **Begin to Implement:** Resolve issues and mitigate risks by escalating them through appropriate channels. Focus on high-impact recommendations and continuously monitor the effect of implementation on each stakeholder group.
4. **Embed Changes into the Company Culture:** After the implementation is complete, put safeguards in place to make the change stick. By embedding changes within the company’s culture and practices, employees will be less likely to go back to the ‘old way of doing things. New organizational structures, controls, and reward systems should all be considered as tools to help change stick.
5. **Review Progress and Analyze Results:** Conducting analysis and review, or a “project post-mortem,” can help business leaders understand whether a change initiative was a success, failure, or mixed result. It can also offer valuable insights and lessons that can be leveraged in future change efforts.

Communication Strategy

Communications is a critical change-enabler. This section presents five strategic principles to support effective communications during a significant, process-driven transformation:

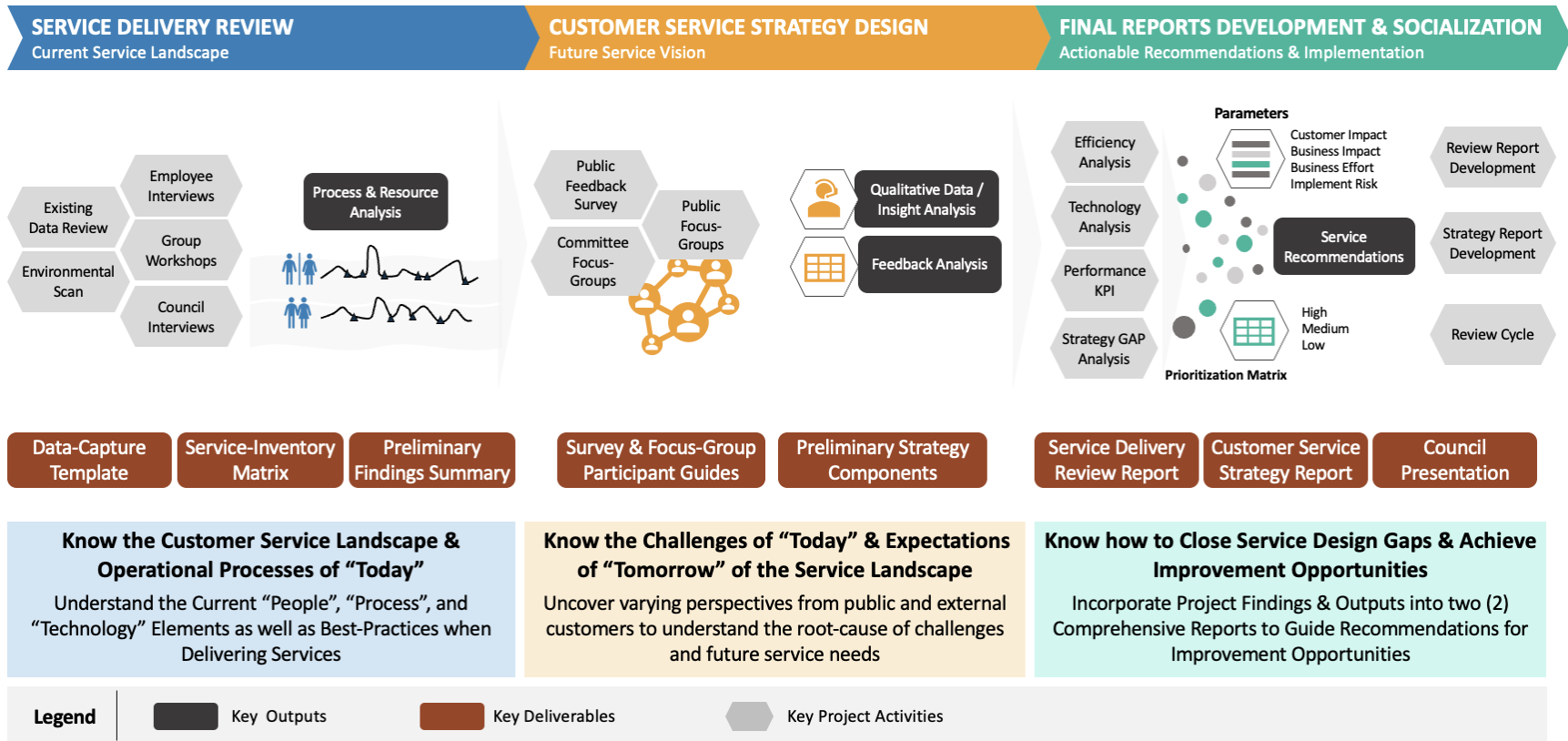
1. Equip leaders and change agents: equip leaders and other change agents with easy-to-use key messages and communication tools.
2. Develop tailored key messages: identify different stakeholder groups and develop targeted key messages for each group.
3. Communicate consistent messages: communicate consistent messages emphasizing the case for change and anticipated benefits.
4. Reinforce messages: repeat and reinforce key messages and progress through a variety of tactics and channels with each stakeholder group.
5. Engage industry: communicate directly and regularly with this stakeholder groups.

These principles should be used as a starting point for the development of a tactical communications plan to support the implementation of the recommendations identified in the report. A tactical communications plan should define the communications-related activities that accompany each recommendation/change as well as the overall improvement project. An effective tactical communications plan should include:

- The overall case for change
- The unique key messages that accompany each initiative or recommendation
- The key audience(s) when communicating each key message
- The roll-out timelines
- The methods and channels that are to be used when communicating

Appendix

Appendix I: Project One Page Summary



Appendix II: Comprehensive List of Recommendations

ID	Recommendation
1A	Design a Centralized Service Delivery Model
1B	Develop Department Service Agreements and Process Maps for the Centralized Model
1C	Develop Centralization Service Resource Model
1D	Integrate Technology Systems Required for a Centralized Service Delivery Model
1E	Design & Build Customer Service Desks to Support the Centralized Model
1F	Develop Virtual Consultation Initiative Design and Implementation
1G	Develop Self-serve Kiosk Design and Implementation
1H	Expand Online Self-Serve Functionality
1I	Develop Customer Online Service Portal
2A	Expand AMANDA System Functionalities
2B	Upgrade Mitel Telephony Functionalities to Support Reporting and Analytic Needs
2C	Develop an Enterprise Content Management (ECM) Strategy and Tools
2D	Redefine Website Architecture
2E	Develop Hybrid Working Model Processes and Procedures
2F	Determine Customer Relationship Management Solution
3A	Develop Customer Service Performance Measurement Framework
3B	Develop Data Governance and Performance Measurement
3C	Determine Department Service Levels
3D	Develop Customer Service Training Framework for Customer Service Roles

Appendix III: List of Halton Hills Online Services

Applications, Licences & Permits	Burn Permit
	Community Investment Fund Application – ‘No longer Available’ message
	Dog Licence – temporarily unavailable
	Facility Request Form
	Fireworks Permit
	Heritage Conservation Award Nomination Form – form is ‘temporarily unavailable’
	Heritage Property Grant Program Application
	Inspection Booking Request
	Marriage Licence
	Neighbourhood Block Party Application
	Road Occupancy Permit Application – pdf format
	Special Event Application
Community Services	Achievement Award Nomination Form
	Book a taxi
	Book a trip with ActiVan
	Citizen Inquiries
	Insurance Claims
	Magnus Mode (accessibility service) - links to download app
	Interactive map of Halton Hills
	Submit a Job Application
	Volunteer Application
Mayor and Council Services	Application to Appear Before Council
	Congratulatory Message From The Mayor Request
	Contact Elected Officials
	Proclamation Request
	Declaration of Interest
Tax & Financial Services	Heritage Tax Refund Program Application
Recreation Services	Program registration forms
	Camp registration forms
	Pass and membership applications
	Volunteer Applications
	Special Event Applications
	Community Partnership Program Application
	Find a Park
	Find a Facility
Program Registration	
Report an Issue	Compliance Memo Request – temporarily unavailable

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	Customer Service Feedback – form is ‘no longer available’
	Enforcement Request – temporarily unavailable
	Report a Building Code Complaint – broken link
	Report a Problem (general)
	Service Request – temporarily unavailable
Ticket Payments and Parking	Pay Parking Tickets
	Parking Exemption Form
Contact Us	Departmental Directory

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Appendix IV: Centralized Resource Model

The following chart provides a snapshot of the Centralized Resource Model. Limitations of the model include the preliminary assumptions of which services would be centralized and the limited amount of data available as inputs.

Within the model, numbers which were estimated (no data available) are depicted in blue and estimated adjustments to volume are depicted in red. Some average volumes were reduced on the assumption that Service Halton Hills would not complete all the calls or tasks presented.

Department	Unit	Service	Centralize	Average Volume of Service (by Year)	Average Effort to Complete (hrs)	Additional Effort / Yr
Business, Environment & Culture		Resolving Customer Inquiries & Complaints	Yes	1,040	0.05	52
Corporate Services	Clerks	Completing Payments for Various Services	Yes	130	0.03	3.9
Corporate Services	Clerks	Completing Various Permits / Licenses / Applications	No	520	N/A	
Corporate Services	Finance	Completing Purchase Orders (PO)	No	207	N/A	
Corporate Services	Finance	Number of Tax Payments Received	No	122,132	N/A	
Corporate Services	Finance	Processing Invoices	No	327	N/A	
Corporate Services	Service Halton Hills	Completing Payments for Various Services	N/A	7,800	0.05	390
Corporate Services	Service Halton Hills	Managing Various Applications & Permits	N/A	1,040	0.08	83.2
Emergency & Fire		Resolving Customer Inquiries & Complaints	Yes	187	0.03	5.61
Office of the CAO	Clerks	Completing Death Registry & Burial Documents	No	364	N/A	
Office of the CAO	Clerks	Resolving Customer Inquiries & Complaints	Yes	3,380	0.03	101.4
Office of the CAO	Clerks	Resolving Enforcement Issues	N	1,304	N/A	
Office of the CAO	Communications	Number of Website "Tickets" Submit by Employees	N	1,000	N/A	
Office of the CAO	Service Halton Hills	Resolving Customer Inquiries & Complaints	N/A	2,860	0.03	85.8
Office of the CAO	Service Halton Hills	Triaging Incoming Customer Connections	N/A	6,240	0.02	124.8
Organization	Multiple Units	Completing Business Licenses	N	103	N/A	
Organization	Multiple Units	Completing Dog License Requests	Y	168	0.03	5.04
Organization	Multiple Units	Resolving Customer Inquiries & Complaints (Mitel - Calls)	Y	101,880	0.03	3056.4
Organization	Online Services	Number of Online "Forms" Submit by Customers*	N	9,043	N/A	
Organization	Online Services	Number of Website Page Views	N	2,925,651	N/A	
Planning & Development	Development Review	Completing Reviews & Approvals	N	124	N/A	
Planning & Development	Development Review	Resolving Customer Inquiries & Complaints	Y	520	0.03	15.6
Recreation & Parks	Recreation	Completing Marketing & Communications Tasks	N	1,820	N/A	
Recreation & Parks	Recreation	Completing Payments for Various Services	Y	8,181	0.08	654.48
Recreation & Parks	Recreation	Completing Recreation Program Registration	Y	4,853	0.375	1819.875
Recreation & Parks	Recreation & Facilities	Resolving Customer Inquiries & Complaints	Y	6,794	0.375	2547.75
Transportation & Public Works	Building Services	Actioning Violations	N	77	N/A	
Transportation & Public Works	Building Services	Completing Building Permits	N	867	N/A	
Transportation & Public Works	Building Services	Completing Customer Service Interactions	Y	153	0.03	4.59
Transportation & Public Works	Building Services	Completing Permit Inspections	N	6,275	N/A	
Transportation & Public Works	Clerks	Actioning Parking Exemptions	N	3,195	N/A	
Transportation & Public Works	Clerks	Issuing Parking Tickets	N	5,450	N/A	
Transportation & Public Works	Clerks	Parking Tickets Paid by Customers	Y	4,687	0.03	140.61
Transportation & Public Works	Development Engineering	Completing Entrance / Road Occupancy Permits	N	51	N/A	
Transportation & Public Works	Public Works	Completing Service Requests	N	2,241	N/A	
Transportation & Public Works	Public Works	Resolving Customer Inquiries & Complaints	Y	2,560	0.05	128

Appendix V: Example KPIs Used by Other Municipalities / Regions

For select, relevant service areas (metric categories), a general Value Statement (written from the citizen perspective on what the service-delivery experience is expected) and internal Objectives for KPI tracking are detailed below.

Service Area	Citizen Value Statement	KPI Objectives
Accounts Payable	I expect invoice payments to be processed in an accurate, timely and efficient manner.	<ul style="list-style-type: none"> • Timely processing of invoices • Accurate payment of bills • Analyzing patterns in expenses and taking advantage of available discounts • Maintaining relationships with suppliers • Providing customer service to internal departments and vendors
Build Permits and Inspections	<p>I expect my municipality to ensure the safety of buildings in accordance with legislative requirements.</p> <p>As an applicant. I expect my municipality to provide clear information about building code requirements and ensure the application process is convenient, timely and accordable.</p>	<ul style="list-style-type: none"> • Ensuring buildings and structures are constructed, renovated, or demolished in a safe and orderly manner • Undertaking reviews and inspections to verify whether new construction or renovation has incorporated the minimum building standards for health, life safety, accessibility, structural sufficiency, environmental integrity, and energy efficiency • Issuing building permits and enforcing provincial building code legislation and applicable law
By-Law Enforcement	I expect my by-laws to be enforced fairly to maintain acceptable standards and safety in my neighbourhood, and I expect that complaints will be resolved in a fair and timely manner.	<ul style="list-style-type: none"> • Yard maintenance • Property standards • Noise control • Zoning enforcement • Animal control
Clerks	I expect my municipality to provide information and access for my municipal government and meet legislative requirements regarding council operations and access to information in a timely and readily accessible manner.	<ul style="list-style-type: none"> • Legislative support to Councils, Standing Committees, Sub-committee, and Volunteer committees • Processing of official correspondence to and from Councils • Coordination of all requests received under the Municipal Freedom of Information and Protection of Privacy Act • Registration of Births and Deaths • Issuance of marriage licenses and various other business licenses and permits • Coordination of municipal elections (every four years)

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Culture	I expect a diverse range of cultural programs and services that are accessible and affordable and bring the community together.	<ul style="list-style-type: none"> • Display local culture • Promote interest in cultural festivals and events • Encourage development of the culture sector in each municipality • Fund and support non-profit cultural organizations to provide arts and heritage programs across the community • Promote and display local heritage through our museums and heritage initiatives
Emergency Medical Services	I expect that if I have a medical emergency, the ambulance will arrive in a timely manner; and I will be assessed, cared for and/or delivered to an appropriate destination, promptly and safely as required.	<ul style="list-style-type: none"> • All people should have equal access to ambulance services • Paramedic services are an integral part of the overall health care system • The most appropriate paramedic assigned resource will respond to a patient regardless of political, administrative, or other artificial boundaries • Ambulance service operators are medically, operationally, and financially accountable to provide service of the highest possible caliber • Ambulance services must adapt to the changing health care, demographic, socio-economic and medical needs in their area
Facilities	Municipality buildings should be accessible, clean, and safe; and environmental and financial sustainability are considered in facility design and operation.	<ul style="list-style-type: none"> • Accessible design standards and space planning related to municipal spaces: Administrative space, arenas, housing, medical and emergency, operations facilities, police services, public works, and public health
Fire and Rescue Services	I need a fire and rescue service that educates the public on fire prevention and responds quickly in a time of emergency to ensure my safety and minimize losses.	<ul style="list-style-type: none"> • Public education and fire prevention • Fire safety standards and enforcement • Emergency response
General Revenue	I expect to receive a bill that is timely, easy to understand, and accurate with options to pay in simple and convenient ways.	<ul style="list-style-type: none"> • Services related to this include: (1) Cash receipts (2) Local improvement billing (3) Special assessment billing (4) Processing bill payments and collections, (5) Monitoring the performance of accounts receivable
Human Resources	I expect fair hiring practices and an equitable employment environment in compliance with applicable legislation; and the provision of	<ul style="list-style-type: none"> • Labour Relations which promote positive relations between management and unions • Compensation and Benefits which oversees and administers the total rewards plans for all employees

	opportunities to develop skills to support employee growth and organizational needs.	<ul style="list-style-type: none"> • Training and Development which includes technical, legislative, and soft skill training for employees, senior management, and department heads • Disability Management for workers compensation, illness, and employee accommodation • Health and Safety and Employee Wellness • HR Technology and People Analytics • Job evaluation as part of compensation • Recruitment and Retention • Organizational Development and Effectiveness • Employee Engagement and Recognition • Equity and Diversity Programming • Pension Administration
Information Technology	I expect to be able to access municipal information and services when, where and how it is convenient for me.	<ul style="list-style-type: none"> • Providing reliable, secure service to residents, businesses and municipal staff across multiple channels including counter, call-centre, and the wired and mobile internet • Developing and supporting information and technology infrastructure. • Establishing best practices to monitor the efficacy of service delivery results and make solutions flexible enough to meet future demands
Licensing	I expect my municipality to ensure my safety by issuing licenses and responding to emerging business models and citizen complaints.	<ul style="list-style-type: none"> • Issuing licenses to businesses that meet the standards set by the by-laws, • Ensuring the standards are maintained • Investigating complaints and any non-compliant issues
Parking	I expect parking to be available within a reasonable distance of my destination, at a competitive rate with a variety of payment options.	<ul style="list-style-type: none"> • Managed parking rates with hours of use conducive to turnover and to the needs of the business • Supporting business, commercial, institutional and entertainment patrons by optimizing the availability of on-street parking for short visits, and providing supplemental, off-street parking for longer visits • Balancing the availability of residential street parking between the needs of the residents, and the needs of the greater community • Equitable enforcement of parking by-laws to ensure compliance and safety for the community

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Parks	I expect to have equitable access to safe and resilient parks and natural areas that meet my recreational and leisure needs, support health and well-being and offer opportunities for me to connect with nature and other in my community.	<ul style="list-style-type: none"> • The public has equitable access to and uses high-quality and connected parks and natural spaces • Public spaces and parks are safe and climate change resilient • The public has awareness of the benefits of trees, green infrastructure, and ravines
Planning	I expect to have clear information about planning requirements in adherence with legislation, and that the application process is convenient, timely, predictable, and affordable, while supporting sustainable community development.	<ul style="list-style-type: none"> • Overseeing the creation and management of a municipality's Official Plan • Leading municipal strategic planning, including environmental initiatives, urban design, transportation planning, area studies and policy development in support of sustainable growth • Growth management
Roads	I expect roads to be well-maintained which allow me to get to where I need to go in a safe, predictable, and timely manner.	<ul style="list-style-type: none"> • Ensure adequate road maintenance • Ensure maintenance supports anticipated growth
Sport and Recreation	I expect fair and equitable access to a variety of affordable recreation and wellness activities in an environment that is welcoming and inclusive in my community.	<ul style="list-style-type: none"> • Ensure the public has equitable access to affordable and high-quality programs and recreational facilities • Ensure municipalities continuously invest in and deliver safe and sustainable Sports & Recreation infrastructure that enhances the quality of life

**Information sourced from MBN Performance Report*

KPI	Description	Metric Type
Number of "Inquiry or Complaint" Emails Received by Customers	The number of contacts (via email) into the Township made by customers relating to a general inquiry / issue.	Likert Scale
Number of "Inquiry or Complaint" Phone Calls Received by Customers	The number of contacts (via phone) into the Township made by customers relating to a general inquiry / issue.	Likert Scale
CSAT: Customer Satisfaction Score	The general positivity / satisfaction customers have with the organization as a whole or any individual aspect.	Quantity Figure
CES: Customer Effort Score	The level of effort / simplicity that customers' experience when interacting with the organization or services.	Quantity Figure

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Number of "Inquiry or Complaint" Phone Calls / Emails Resolved within Defined Agreements (SLA)	The total number of received customer inquiries that were able to be resolved / completed within the set timelines and/or formalized Service Level Agreements.	Quantity Figure
CIP: Customer Interaction Preferences	The general preferences customers have when interacting with the organization / services (questions based on what channels they use, when they interact, how often / frequently they interact, how they want to be communicated with, etc.)	Quantity Figure
ART: Average Resolution Time	The total time that is taken by the support team to solve the issue once it has been received / "opened"	Time Figure
IPR: Interactions Per Resolution	The number of interactions the support employees / team and the customer have about a single issue before coming to a resolution.	Quantity Figure
FRT: First-Response Time	The time it takes from when a customer makes a request to the time an employee "picks up / opens" the ticket / case / inquiry	Time Figure
ABR: Abandon Rate	The number of calls "abandoned / hung-up" while a customer was waiting on hold to connect with a human employee.	Quantity Figure
Number of FOI Requests Received	The total number of FOI request received into the department from customers	Quantity Figure
Number of FOI Requests Completed in Defined Service Level Agreements	The total number of FOI request completed within set timelines by department employees	Quantity Figure
Number of Licenses / Tags / Certificates Issued	The total number of Licenses / Tags requests received into the department from customers. Also tracking the number of Licenses / Tags issued to customers from requests.	Quantity Figure
Number of Emergency Response Calls Received	The total number of emergency contacts received by customers	Quantity Figure
Number of Applications Received by Customers	The number of new development applications received annually (i.e., Sub-division Applications, Condo Applications, Site-Plans, Zoning Applications, Official Plan Amendments, Housing Starts, etc.)	Quantity Figure
Number of License Applications Received	The total number of business licenses received by customers	Quantity Figure
Number of Business Licenses Issued	Total number of business licenses issued	Quantity Figure
Number of Applications / Permits Completed within Defined Service Level Agreements	The total number of received customer applications / permits that were able to be resolved / completed within the set timelines.	Quantity Figure

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Number of Permits Received / Reviewed (+value of)	The total number of construction / renovation permits received by all customer types (i.e., residential, commercial, etc.)	Quantity Figure
Number of Customers Enrolled in Recreational Programs	The total number of customers that participate in recreational programs	Quantity Figure

Appendix VI: CSPN Customer Service Training Courses and Landscape

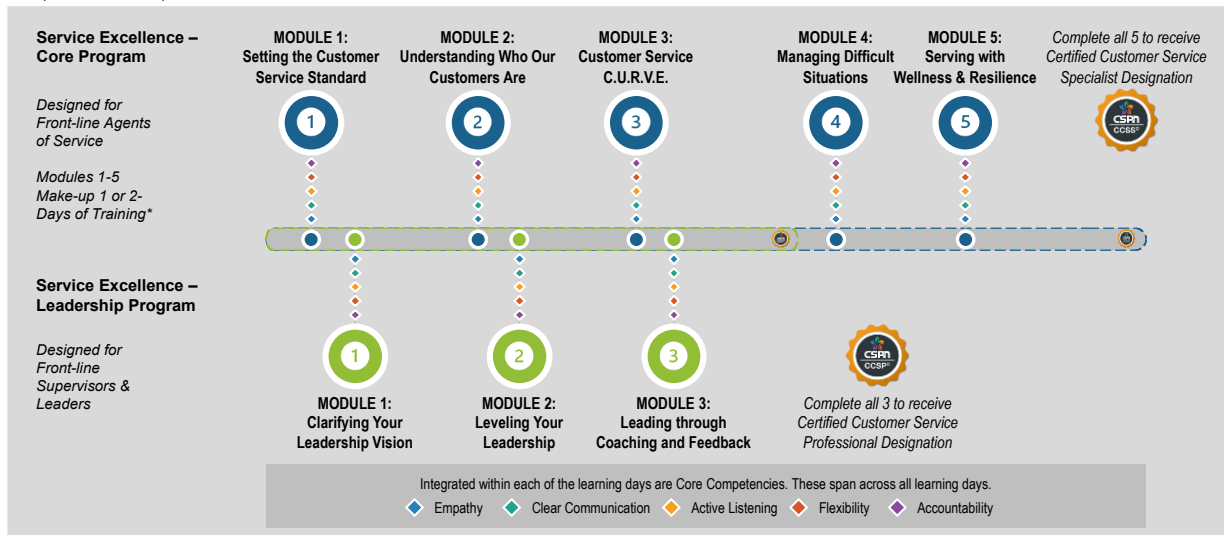
CSPN Training Courses

<p>CUSTOMER SERVICE</p> <ul style="list-style-type: none"> ✓ Service Excellence Designations <ul style="list-style-type: none"> • Certified Client Service Specialist (CCSS®) • Certified Client Service Specialist - Public Sector (CCSS®) • Certified Client Service Professional (CCSP®) • Certified Customer Experience Professional (CCXP®) ✓ Building Strategic Client Relationships ✓ Creating a Customer-Centric Culture ✓ Customer Service for the Hospitality Industry ✓ Customer Success Strategy ✓ Delivering World Class Customer Service ✓ Internal Customer Service ✓ Managing Difficult Clients and Situations ✓ World Class Customer Service ✓ Managing Customer Conversations Through Chat ✓ Serving the Customer Through Digital Channels ✓ Social Branding 	<p>PROBLEM SOLVING & PRODUCTIVITY</p> <ul style="list-style-type: none"> ✓ Advanced Time Management ✓ Conflict Management and Resolution ✓ Effective Meeting Facilitation 	<p>LEADERSHIP & COACHING</p> <ul style="list-style-type: none"> ✓ Coaching for Performance ✓ Contact Centre Leadership and Management ✓ Effective Delegation ✓ Emerging Leaders ✓ Influencing Others Without Authority ✓ Introduction to Coaching ✓ Leadership Excellence ✓ Leading & Coaching with Impact ✓ Leading Change ✓ Leading Through Conflict ✓ Leading Without Authority ✓ Leading World-Class Organizations ✓ One-to-One Coaching (front-line to executive) ✓ Performance Management ✓ Strategic Leadership ✓ Understanding Emotional Intelligence ✓ Understanding Motivation ✓ Women in Leadership <p>Assessments:</p> <ul style="list-style-type: none"> • Personality Dimensions Leadership Focus • 360° Feedback Assessment 	<p>TEAM EFFECTIVENESS</p> <ul style="list-style-type: none"> ✓ Building Agile and Productive Teams ✓ Corporate Team Building ✓ Developing Emotional Intelligence for Enhanced Teamwork ✓ Leading Diverse Teams ✓ Leading Virtual Teams ✓ Maximizing the Potential of a Remote Workforce ✓ Team Building Events ✓ Teamwork Foundations Series <p>BUSINESS WRITING</p> <ul style="list-style-type: none"> ✓ Effective Email Etiquette ✓ Non-Conformance Writing ✓ Persuasive Business Writing ✓ Report Writing ✓ Technical Writing
<p>INTERPERSONAL COMMUNICATION</p> <ul style="list-style-type: none"> ✓ Advanced Presentation Skills ✓ Communicating Effectively to Diverse Cultures ✓ Communicating with Multiple Generations ✓ Communication Style Assessments ✓ Emotional Intelligence ✓ Handling Critical Conversations ✓ Keynote Presentations 	<p>MOTIVATION & HR SUPPORT</p> <ul style="list-style-type: none"> ✓ Dealing with Change and Transition Diversity Training in the Workplace Health and Safety Training Improving Work Life Balance Mediation Vs. Conflict Management Mind Mapping ✓ Mindfulness at Work ✓ Performance Measurement & Tracking Privacy 	<p>PROJECT & PEOPLE MANAGEMENT</p> <ul style="list-style-type: none"> ✓ Advanced Time Management Communication Management in Project Management ✓ Delegating for Growth Juggling Multiple Priorities Managing Client Relationships Managing Project Conflict Managing Stress & Change ✓ Outstanding Administrative Practices Project Management Fundamentals 	<p>ED&I</p> <ul style="list-style-type: none"> ✓ Understanding ED&I ✓ Promoting and Managing Healthy ED&I-related Conversations ✓ Building Inclusive Cultures and Allies ✓ Inclusive Service ✓ Diverse Hiring Practices ✓ ED&I Remediation & Investigation ✓ Unconscious Bias
<p>SALES & INFLUENCE</p> <ul style="list-style-type: none"> ✓ Service that Sells ✓ Advanced Service That Sells ✓ Negotiating for Success ✓ Sales Fundamentals 	<p>MICROSOFT SKILLS</p> <ul style="list-style-type: none"> ✓ Excel Beginner, Intermediate & Advanced ✓ Microsoft Office Suite ✓ Microsoft Project, PowerPoint, Access 		

CSPN Training Service Excellence Landscape

CSPN – Service Excellence Landscape

Targeted to front-line agents through to Managers and Supervisors, CSPN's Customer Service and Customer Success programs are designed to provide the soft and hard skills to continuously deliver exceptional customer experiences.





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