

January 23, 2023



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

Council Presentation

Prepared By:



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Team Overview

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Agenda



Project Introduction & Overview	05mins
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Business Goals & Customer Needs	15mins
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Service Delivery Review Summary	10mins
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Customer Service Strategy Summary	25mins
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Open Q&A	
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Project Introduction & Overview

Project Goals

The Town of Halton Hills is looking to **continuously improve on how the organization delivers services and engages with customers**. 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 as outlined within the proposal.

Project Success Requires Meeting 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.

Project Deliverables Outline

VISION

- ✓ Cultivating a **Customer-First Culture** for all Employees at all Levels of the Organization
- ✓ Aligning **Customer Needs, Wants, and Acceptance** with Ongoing Service Transformation Initiatives
- ✓ Incorporating Technology for a Digital First Halton Hills, Make Service **Easy for Customers & Easy for Employees**

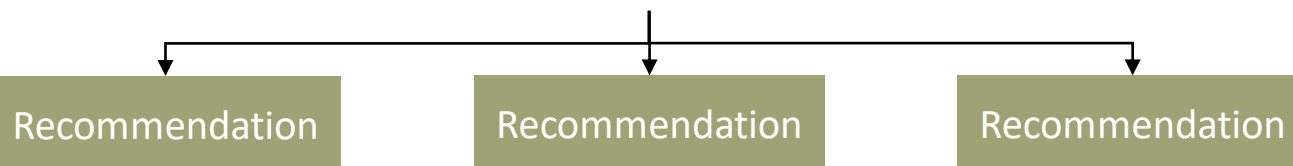
CUSTOMER SERVICE STRATEGY

Purpose:

Building on insights uncovered within the Service Delivery Review, define the future Strategy

Overall Goal:

Identify strategic elements for how to design the service model, tools and measurements



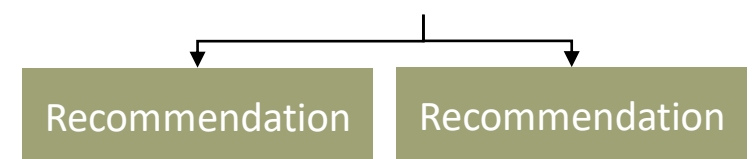
SERVICE DELIVERY REVIEW

Purpose:

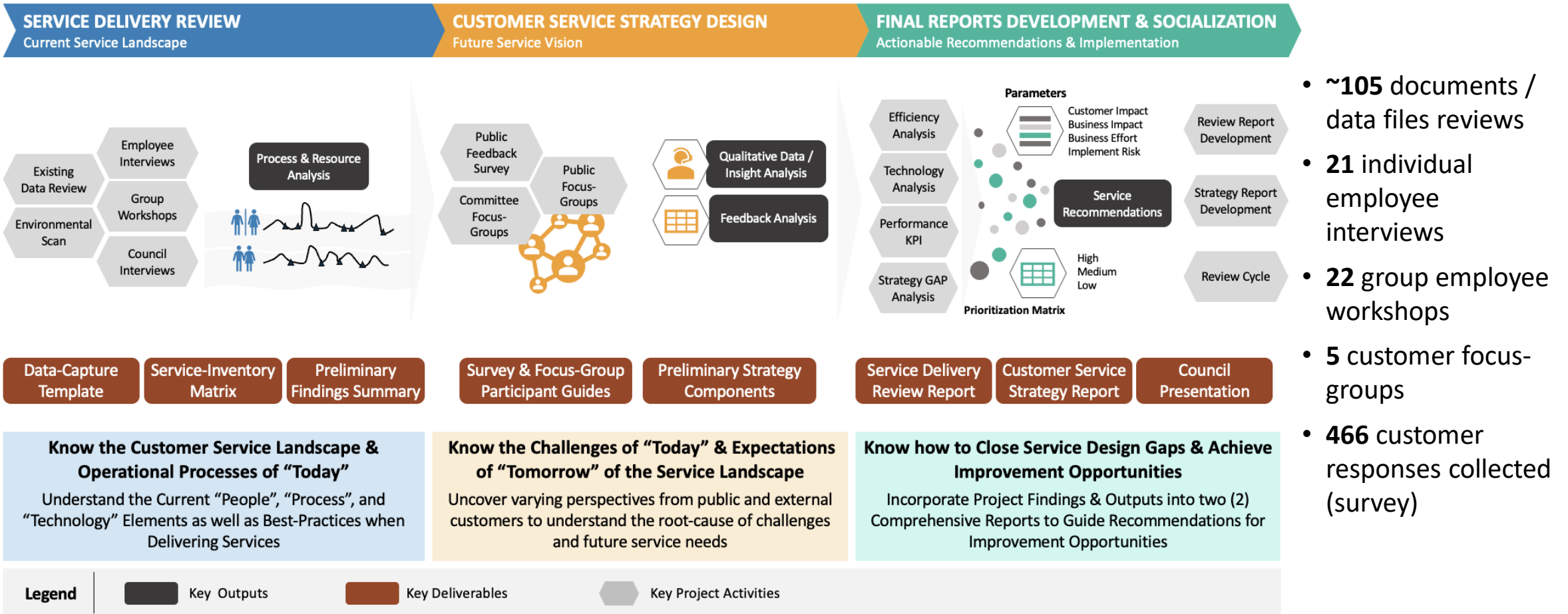
Document the current-state of service delivery

Overall Goal:

Identify recommendations for cost / efficiency savings



Project One-Page Summary





Business Goals & Customer Needs

Business Goals

Service Delivery Review & Customer Service Strategy

Cultivation of a **Customer-First Culture** for all Employees at all Levels of the Organization.

Alignment of **Customer Needs, Wants, and Acceptance** with Ongoing Service Transformation Initiatives.

Building Upon Townhall Masterplan to Define **“How” Best to Deliver Service** in the new Environment.

Consolidation of service inquiries / requests to decrease customer points of contact and increase customer satisfaction.

Incorporation of Technology for a Digital First Halton Hills, Making it **Easy for Customers** to Use Services and **Easy for Employees** to Deliver Services.

Expansion of online services to meet the needs of a more diverse population.

Customer Needs

Service Delivery Review & Customer Service Strategy

A **single point of contact** for streamlined contact with the Town no matter the service or inquiry need.

Access to services, information, and communications **across multiple channels** that are already being used (email, phone).

Ability to **use digital tools to self-serve** and complete services without any support / interaction with the Town.

Clear, up to date information and proactive communications to keep informed and apprised of changes.

Consistent service without surprises (**interactions meet expectations and do not change** across timeline or employees).

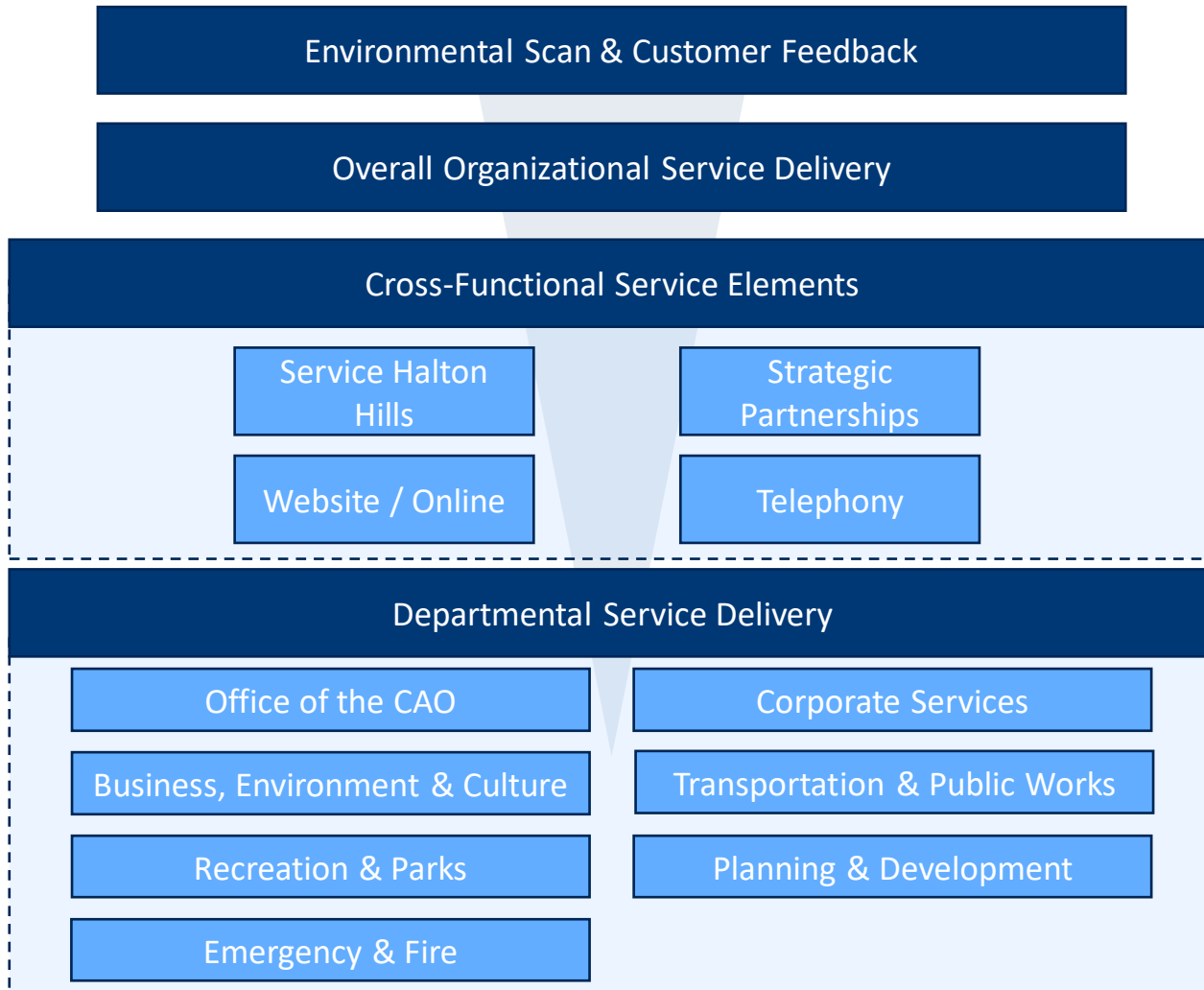
Appropriate level of **timeliness / responsiveness for services** completed and communications received.

Ownership over getting services / issues completed and not getting lost or forgotten (want the Town to close the loop).



Service Delivery Review Summary

Service Delivery Review



Service Profile

FINDINGS & OBSERVATIONS

- Services Offered
- Service Levels & Measures
- Channels Utilized
- Internal Process
- Technology
- Training & Resourcing
- Customer Experience

RECOMMENDATIONS

- Cost Recommendations
- Efficiency Recommendations

Service Delivery Review Outcomes

The Service Delivery Review uncovered cost and efficiency savings opportunities around the following main categories. To realize the recommendations, **department leaders will need to reference the report, identify which actions are wanting to be completed and confirm a final decision for planning on how the opportunity will be implemented moving forward.**

- ✓ Decrease Task Duplication
- ✓ Streamline Activities
- ✓ Mitigate Future Cost
- ✓ Increase Self-Serve Volume
- ✓ Improve Service Experience

Service Delivery Review Outcomes

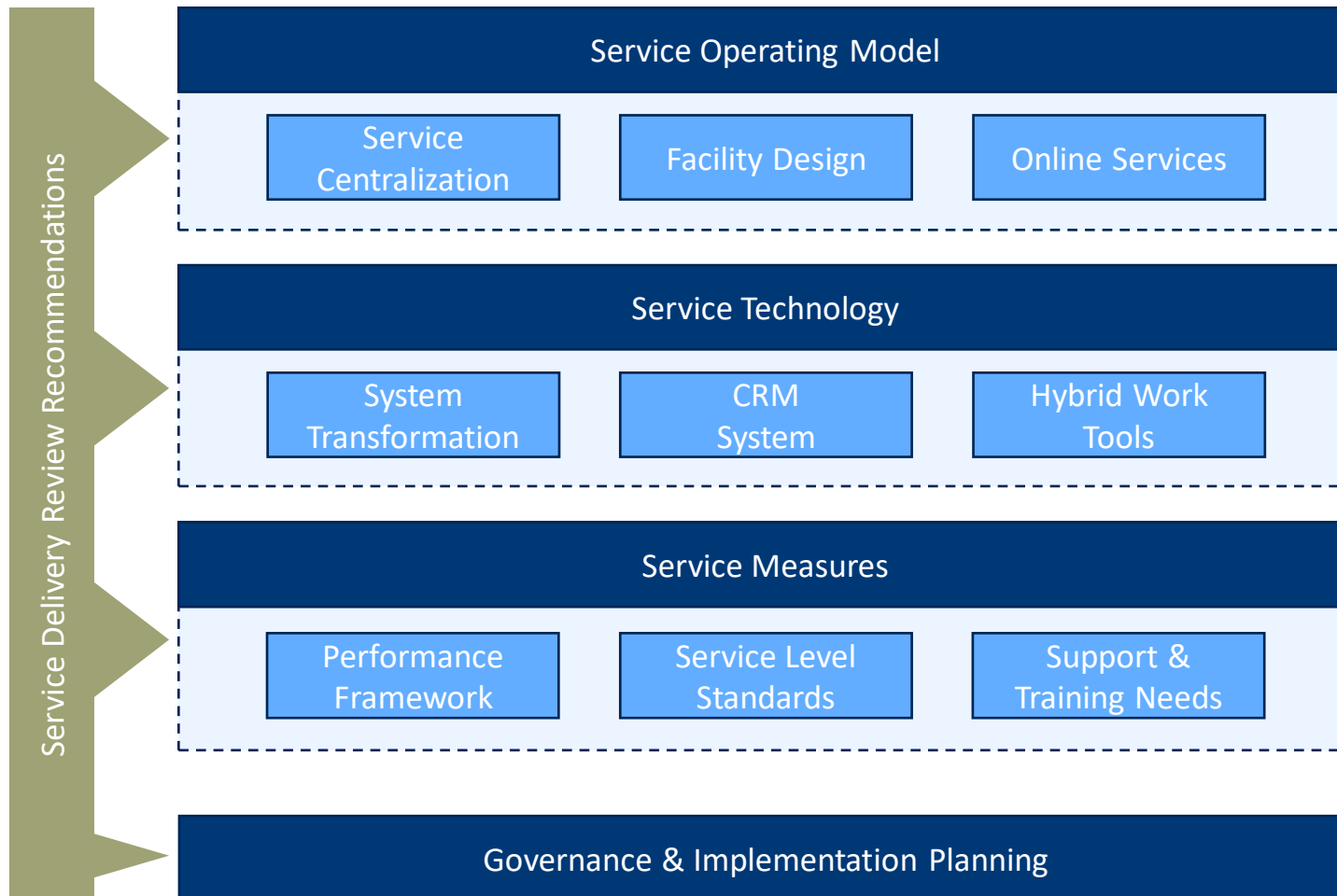
“Through the comprehensive Service Delivery Review, **144 services / expenditures were assessed**. Of those assessed, **66 were identified as having potential cost savings**. This translates into a percentage of 45.83%.”

	Number of Recommendations	Estimated Annual Efficiency Savings (hrs.)		Estimated Annual Cost Savings (\$)	
		Low Range	High Range	Low Range	High Range
Total	66	5,750	12,550	\$350,000	\$815,000
Overall Organization	16	1,750	3,750	\$125,000	\$255,000
Office of the CAO	12	250	900	\$10,000	\$75,000
Business, Environment & Culture	3	250	650	\$20,000	\$45,000
Corporate Services	6	1,100	2,250	\$65,000	\$135,000
Transportation & Public Works	14	1,750	3,250	\$105,000	\$230,000
Recreation & Parks	7	100	250	\$10,000	\$25,000
Planning & Development Services	6	450	1,200	\$15,000	\$40,000
Emergency & Fire Services	2	0	100	\$0	\$10,000



Customer Service Strategy Summary

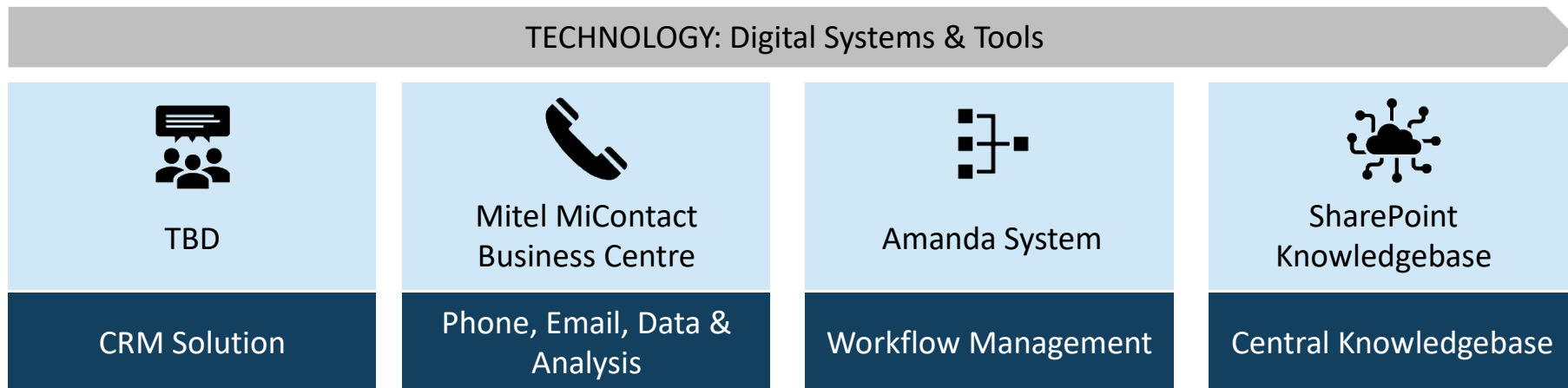
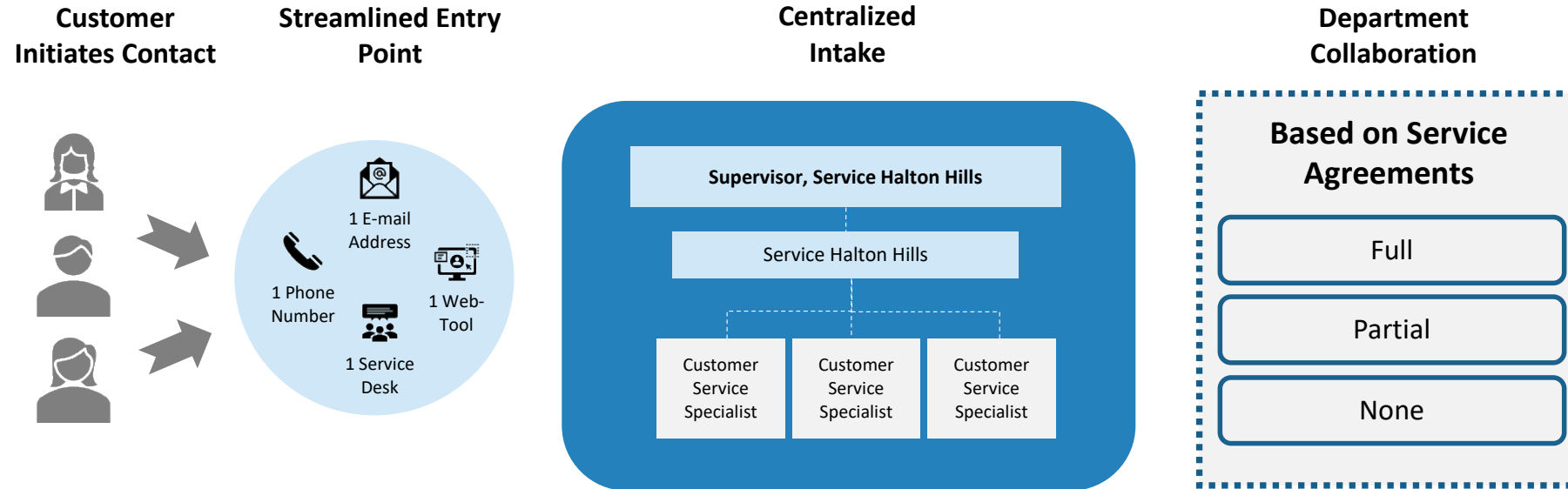
Customer Service Strategy



Strategic Recommendations Content

- Summary of Key Finding & Observations
- Detailed description of individual recommendations
 - What is the challenge?
 - What is the improvement?
 - What is recommended?
 - What are the key components?
What are the outcomes?
- Alignment of Service Delivery Review Efficiencies & Savings to Strategic Recommendations
- Actions to implement.

Centralized Service Delivery Model



Customer Service Strategy Outcomes

What does the future of Customer Service at Halton Hills look like?



Service Operating Model

- Dedicated customer service function with single point of contact for the Town
- Clearly defined goals, expectations, standards and performance measures for customer service
- Omni-channel service interactions, activities, and communications for customers / employees

Service Technology

- Self-serve capabilities through online portals and in-facility kiosks / terminals
- Digital service-tasks with increased automation of tasks
- Integration of key IT system to increase accessibility and sharing of information

Service Measures

- Consistent tracking of performance measures for customer service
- Continuous tracking of service interactions and feedback to make data-driven decisions
- Cross-skilled and trained service staff for agile and flexible service delivery



Implementation Planning

Focus-Areas for Quick Wins

The following key **improvement opportunity focus-areas** have been identified as tangible examples to support the Town in **planning for activities that can be implemented in the short-term** timeframe as next steps.

- ✓ Build Department Profiles through documenting the services, responsibilities and key personnel
- ✓ Define Service Level Agreements with current Service Halton Hills desk for high-volume customer interactions
- ✓ Standardize tasks and provide inhouse training to employees on current major IT systems
- ✓ Build formal SharePoint site for current Service Halton Hills to access information and documents
- ✓ Design formal Customer Satisfaction (CSAT) survey and deploy on a semi-annual basis
- ✓ Consolidate all Town Point-of-Sale (PoS) Systems to a single vendor
- ✓ Remove direct contact phone numbers and email addresses into individual departments (update IVR to align)
- ✓ Perform website diagnostic to repair broken links and refresh critical “service” information on landing page
- ✓ Define customer-complaint escalation process for who is involved and the activities to be completed

Transformation Implementation Roadmap

ID	Phased Recommendation	Short-Term				Medium-Term				Long-Term			
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												



Open Q&A



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