MEMORANDUM

TO: Mayor Bonnette and Members of Council

FROM: Samantha Howard, Manager of Recreation Services

DATE: August 24, 2018

MEMORANDUM NO.: MEM-RP-2018-0003

RE: Launch of New Recreation Management Software

PURPOSE OF THE MEMORANDUM:

The purpose of this memorandum is to provide Council with an update regarding the launch of PerfectMind, the Town's new Recreation Management Software.

BACKGROUND:

In October 2016 Council awarded the contract to PerfectMind for the next Recreation Management Software solution. A dedicated Project Lead worked with staff to do an analysis of current practices and establish goals for future business process improvements and efficiencies to enhance the internal and external customer service experience. Staff identified key services in Recreation and Parks that are currently being carried out, tracked and reported through other mechanisms, and looked for ways to strengthen this part of our business in PerfectMind. One of the primary goals of the project was to provide a more efficient and enhanced level of service to our customers both online and onsite. PerfectMind is scheduled to Go Live on Wednesday September 12, 2018 at six (6) Town facilities.

COMMENTS:

PerfectMind Inc. provides a hosted Platform as a Service (PaaS) solution that will enable the Town to continue to enhance the customer service experience through new system functionality and enhanced online services. The scope of the project was the complete replacement of the current recreation management software (CLASS) used at all Recreation and Parks customer service counters, and customer access to more services at facilities that are currently underserviced. PerfectMind is a customer-focused system that will enable the Town to take significant steps to improve processes, specifically in the areas of registration and facility bookings, and have additional value-add services with pass sales, point of sale (POS), financial accounting records, marketing, and increased capacity for online customer interaction and transactions. The

implementation of this new software will integrate Recreation and Parks customer service locations, streamline and align the customer service experience, and manage the impact and demands for increased service levels that come with community growth.

PerfectMind has been the chosen vendor for many local municipalities including Milton and Burlington within Halton Region. Staff will continue to monitor use in other municipalities to identify key issues and best practices.

PerfectMind will Go Live on Wednesday September 12, 2018 at the following six (6) Town locations: Town Hall, Gellert Community Centre, Mold-Masters SportsPlex, Acton Community Centre (including Hillsview Acton), Hillsview Active Living Centre – Georgetown, and the Cultural Centre. Services at Acton and Georgetown Indoor Pools will be launched in the coming months. Information on how to set up a new client account is currently on the website, in the Fall/Winter Activities Guide and other communication platforms. Additional customer service staff support will be available onsite in September to assist with the launch.

Our Goals

At the onset of this project, staff had established key performance indicators that helped guide configuration of the system to create a customer-focused product. These were used as check points throughout the project in order to maintain priorities. Key indicators include:

- Increased customer engagement and satisfaction;
- Faster payment transactions with digitized products/services/passes;
- Faster and easier booking of spaces and registration of programs;
- Enhanced online options like management of individual and family accounts and purchase of recreation passes;
- Flexible, customized reporting that informs the department Business Plan;
- Improved integration with finance, GIS and other business software with single sign-on capability; and
- System delivery on-time and on-budget.

Key Business Features and Benefits

PerfectMind has many features benefitting both the public and staff. The following provides an overview of the business process improvements that customers will see within each module.

Client Management

PerfectMind allows customers and staff to manage all customer information from a central location. Online account set up and management allows for more self-serve options for customers from the convenience of home any time of the day. Customers

can manage family accounts, sign up for programs, purchase passes, and reserve facilities with approval from any device, anywhere, anytime.

Customers can enter credit card details online to complete transactions in a secure and convenient way. Once a payment is processed, customers will receive a receipt confirming they are signed up or have purchased their desired product and their payment has been processed and accepted.

Customers will also have the capability of viewing their personal and family member schedules, attendance history and all transactions related to these purchases and bookings at their own convenience.

Program Registration

The PerfectMind activity registration is very intuitive and user-friendly for both customers and staff. Customers can continue to register for activities online when and where is most convenient for them in just a few minutes without having to print, manually fill out and send paper forms. All customer documents can be created, saved, printed, emailed and stored directly in each customer profile resulting a decrease in paper storage.

Customers can still choose on-site program registration at any of the six Recreation and Parks facilities launched on September 12.

Pass Sales & Point of Sale (POS)

PerfectMind has a flexible and responsive POS system for all recreation products, services, passes and events including new gift card and pass options that are available for purchase online. All passes are digital and attached to a unique client ID card making onsite access easy with a scan of the card. Customers will have the option to buy new, auto-renew or make changes to passes online within their customer account.

A point-of-sale (POS) system is an enhanced touchscreen / scanner / cash drawer but because it's based on a PC computer, it opens up new opportunities for more in-depth data collection and business analysis to drive our business decisions. It will provide staff with greater accuracy because scanning is more accurate than manually producing and editing pass cards and gives more insight on who is utilizing which passes at what event and time. The POS system will also give staff capacity to manage inventory, flag items for reorder and analyze sales patterns helping to inform future business decisions. With the implementation of a POS system, payment methods options have been expanded at all six locations including cash, cheque, debit, credit card and gift card.

Facility Bookings

Our booking process gives customers the opportunity to view facility availability online based on the parameters and needs of the activity / event and submit facility rental requests with approval. All documentation related to the booking such as insurance, contract revisions, and signatures can be executed digitally and saved on the customer/organization profile. This phase of PerfectMind system will launch in October 2018.

Marketing and Customer Engagement

PerfectMind has a marketing module that is customizable to suit our business needs for programs, campaigns, and personalized operations. Staff has the ability to create, track and measure marketing campaigns allowing for greater connectivity and engagement with our community. For example, customers can opt-in to receive emails regarding program registration details, facility bookings, promotions and new products or services straight to their inbox, including whenever a new event of their interest is launched, without having to look for it.

Staff can create new workflows to automate regular check-ins and evaluations throughout the customer lifecycle which can be as simple as sending a birthday wish or to provide valuable feedback for improving services and experiences in our programs and facilities.

Accounting and Reporting

The accounting and reporting modules within PerfectMind will generate staff efficiencies. This includes the capability of creating 'custom' reports such as GL export for finance, facility utilization for operations and participation rates for programs. Daily, weekly and monthly dashboards can also be customized for a big picture overview of business metrics. All data can be captured and analysed with the capability of creating richer insight to improve overall facility usage and program success.

Staff are currently working on aligning key performance measures with the annual business plan to inform Council of key business practices and results.

CONCLUSION:

PerfectMind, the new Recreation Management Software for Recreation and Parks is scheduled to 'Go Live' on September 12, 2018. The solution is more customer focused and provides enhanced online features allowing for ease and flexibility to residents. Post Go Live, PerfectMind will continue to develop and adapt to the changing needs of all users across the board allowing us to grow without the need for paid upgrades or server and network maintenance. The opportunities to take advantage of this technology to improve operations and drive new customer value, internally and

externally. The system staff will continue to work with PerfectMind for innovative enhancements and features that continually support our business and provide optimal customer services to the residents of Halton Hills.

Reviewed and Approved by,

Warren Harris, Commissioner of Recreation and Parks

Brent Marshall, CAO