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TO: GENERAL COMMITTEE

SUBJECT: CUSTOMER CONTACT CENTRE BUSINESS PLAN

WARD: ALL

PREPARED BY AND KEY CONTACT: M. KOVACS   
MANAGER CUSTOMER SERVICE (Ext. 4747)

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

EXECUTIVE DIRECTOR APPROVAL: R. JAMES-REID   
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CHIEF ADMINISTRATIVE OFFICER APPROVAL: C. LADD   
CHIEF ADMINISTRATIVE OFFICER

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**RECOMMENDED MOTION**

1. That the Customer Contact Centre Business Plan detailed in Appendix "A" to Staff Report ACC001-15, be approved.
2. That the Intake Form(s) associated with the Customer Contact Centre be considered as part of the 2016 Budget and Business Plan.

**PURPOSE & BACKGROUND**

3. The purpose of this staff report is to provide the implementation plan and costing for the Customer Service Plan that was approved in principle by Council in September 2014 (Motion # 14-G-239).
4. In 2010 Council developed a Strategic Plan for the 2010 – 2014 term of Council to advance the Vision for the City. One of the strategic priorities was to Improve and Expand Community Involvement and City Interactions through the development a Customer Service Strategy and Enhance Customer Experiences. After extensive consultation with customers, staff, and businesses, Access Barrie presented a plan for Customer Service to Council in September 2014 which was approved in principle (attached as Appendix "B").
5. Access Barrie committed to preparing a business case for the Customer Service Plan for consideration by Council in 2015. Council gave direction for the business case to be developed with the principle that costs be minimized wherever feasible while recognizing that there would be necessary capital investments in technology and hardware.
6. The City of Barrie's vision for customer service is to enhance the customer service experience by providing efficient, accessible, consistent service and by treating everyone – customers and employees – with respect.
7. This vision aligns with the Executive Management Team and Customer Service Plan Mission Statement of:  
"To build a customer focused organization responsive to the community where all staff understand and embrace their fundamental role as one of serving the Community"

8. The key recommendations of the Customer Service Plan are to move the City of Barrie from a decentralized model for customer service to a centralized model with the following aims.
  - a) Create a Call Centre that merges 40+ existing phone numbers into ONE number.
  - b) Provide a "one stop" customer Contact Centre.
  - c) Expand mobile solutions and leverage technology.
  - d) Enhance Barrie.ca to improve the ability of customers to conducted business.
  - e) Introduce a consistent corporate-wide tracking method.
  - f) Create a centralized knowledge base.
  - g) Provide enhanced City Services at Community Centres.
9. The business case that was prepared, focusses on the development of the Customer Contact Centre and the associated merging of phone numbers, tracking of customer interactions and creating a system to centrally manage corporate customer service knowledge. The majority of costs for the Customer Service Plan are associated with this portion of the plan.
10. On September 30, 2015, Access Barrie made a presentation to Finance and Corporate Services Committee. The committee provided feedback to further inform the Customer Contact Centre Business Case (attached as Appendix "C")

#### **ANALYSIS**

11. The City of Barrie's current customer service model is not intuitive to customers. Customers are required to know the internal structure of the City in order to reach the department that can complete their request and in turn, each department is only equipped to provide customer service along its specific area of responsibility alone. As a result, customers are often not clear on where and how to contact us for the more than 60 services the City provides.
12. An internal review of all customer service counters within the City was completed and found that corporate customer service procedures have been optimized, but are stretched to capacity. Expected growth and customer expectations of efficiency and effectiveness require a new model for service.
13. The business case (Appendix "A") recommends the formation of the Customer Contact Centre in phases over a 3 – 5 year period starting in 2016. The contact centre is to be located on the first floor of City Hall where the Finance counter is currently located. The Customer Contact Centre would be a One Stop Service area for most general city services and would include counter, phone and email interactions.
14. The first phase of the contact centre would amalgamate the existing resources from Access Barrie – switchboard services, a portion of Revenue Branch in Finance, Information desk functions of Legislative Services and the service request functions of Roads, Parks & Fleet. Subsequent phases are described later in this report.
15. Technology is the key to providing customer service in a contact centre environment. Having well defined integrated communications, customer management and knowledge systems that organize and track customer service delivery, store information and the processes required to complete interactions with the Corporation is integral to the project. These systems are integrated enterprise technologies that are specific to consolidating all channels of customer service in a centralized manner. A full description of the technologies required for a successful Customer Contact Centre is detailed in the attached Business Case.
16. Technology will ensure accurate, consistent and quality service. Technology will allow servicing customers and locating specific information faster and more efficient as it will allow staff to build

an easily accessed, comprehensive knowledge database of information specific to the City of Barrie. Tracking and reporting capabilities that will be possible with a Customer Management solution will have real value for the Corporation for future business planning and process improvements.

17. A Contact Centre with Customer Management (CRM) technology helps manage all facets of the customer relationship. Combined with an integrated Knowledge Management (KM) system, a CRM will allow for the following benefits;
- a) Customer service problem management, trouble ticketing and case management;
  - b) A single view of the customer experience and history (customer data integration);
  - c) Consistent treatment of the customer across all channels;
  - d) Customer requests will not be lost as tracking of all interactions provides for strong historical support;
  - e) Increased capacity to handle expected future growth in population;
  - f) Effective support for business continuity in emergency situations;
  - g) Real-time decision support (analytics) to understand customer requests, and customize services and interactions accordingly;
  - h) Real-time feedback and surveys;
  - i) Future self-service systems, including,
    - Creation of issue/service requests online;
    - Web access for status updates/service changes/cancellation of service;
    - Auto notifications on completion of request and customer surveys;
    - Support for online request management, including mobile customers.

#### Phasing Recommendations

18. The transition to this new consolidated model will take time and in order to be successful must be done in phases. Phasing will ensure that the Contact Centre Team learns throughout the process, builds on successes and ensure quality, consistency and accuracy while meeting the goal of enhancing the customer experience. It is expected that it may take 3 - 5 years or more to fully implement the Customer Contact Centre.
- a) Phase 1 – Form Customer Service Branch
    - Access Barrie (switchboard), Finance (portion of Revenue Branch), Legislative Services (information desk functions), Roads, Parks & Fleet (requests & inquiries)
    - Phone, Counter, Email – estimate 180,000 transactions
  - b) Phase 2 – Customer Service Transactions, Requests and Inquiries only for the following services:
    - Corporate Facilities, Engineering, Recreation, Waste Management
    - Phone, Counter, Email – estimate 27,500 transactions

- c) Phase 3 - Customer Service Transactions, Requests and Inquiries only for the following services:
    - Legislative Services, Building, Fire (permits)
    - Phone, Counter, Email – estimate 25,000 transactions
  - d) Phase 4 - Customer Service Transactions, Requests and Inquiries only for the following services:
    - By-law Services, Planning, Culture and other smaller services
    - Phone, Counter, Email – estimate 35,000 transactions
  - e) Phase 5 - Customer Service Transactions, Requests and Inquiries only for the following services:
    - Waste Water and Water Operations
    - Phone, Counter, Email – estimate 14,000 transactions
19. All phases will involve customer transactions and inquiries only. Technical and detailed queries and services will be addressed in the home departments. It is anticipated that 80% of calls will be handled within the Customer Contact Centre with the other 20% needing to be referred directly to the departments due to complexity and specific technical requirements of the request.
20. The Customer Contact Centre team will be built by transitioning an estimated 14 existing positions from a variety of departments. A key underlying principle will be that as services are transitioned from departments into the contact centre, the resources that deliver the service will move with them. This approach will help staff and customers adapt to the new contact centre environment.
21. One new position is being requested in the 2016 Business Plan for this project. The position would assist in the development and management of a system to track and maintain City of Barrie corporate customer knowledge and service processes for use in a Customer Contact Centre environment. This is a new function and capacity that currently does not exist elsewhere in the corporation. This position is a key component that is required to setup the contact centre. Full details regarding this position can be found in the Business Case.
22. Thirteen municipalities were studied and were found to have, or were moving towards, integrated one-stop service counters offering a full range of municipal services accessible through multiple channels – counter, phone and email. Most front counters serve as the single financial transaction point for the majority of departments and services. These municipalities include; Kingston, Guelph, Brantford, Halton Region, Hamilton, County of Simcoe, Ajax, Markham, Newmarket, Oakville, Ottawa, Kitchener and Oshawa.
23. Most municipalities reviewed provide a central point of contact for customer service for counter, phone and email services. Most are using or are moving towards the use of customer tracking technology to consistently track, measure and report on customer interactions.

#### Return on Investment

24. The provision of customer service is a core service of the municipality. Up until now, very diverse types of services have been delivered by individual departments in different and unique ways. As a result of these differences a consistent tracking of similar types of statistics and metrics has not been done. This resulting absence of data has made quantifying the potential costs savings and benefits challenging in a true business format.

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25. The following areas represent where significant gains in efficiencies will result in better allocation of resources and where time, effort and costs can be saved for the customer and staff.
- a) The right resources in the right place at the right time can more easily respond to peak periods.
  - b) Embedded quality service standards can ensure customer satisfaction.
  - c) Consistency of messaging can reduce the possibility of misinformation to the customer and the need for the customer to make multiple requests for the same information.
  - d) Ease of use of a Contact Centre will increase usage decreasing demand on departments. This will allow technical staff to have increased technical capacity rather than the repetitive and time consuming back and forth with customers on a daily basis.
  - e) When customer service technology is integrated with other corporate technology, there is a significant reduction in rework.
  - f) Cost avoidance may be possible as increased efficiency can balance off growth related increases in requests for service.
  - g) A request or inquiry is only handled once. This can increase customer satisfaction as customers do not have to go between several departments or areas for service.
  - h) Contact Centre staff will be specifically trained and dedicated to customer service leading to the customer feeling supported. This enhances confidence in the Corporation when dealing with the City of Barrie.
  - i) When all calls are tracked, no customer request is lost. This will increase customer satisfaction and confidence.
  - j) Statistics that will be available will inform future planning including, service delivery enhancements, infrastructure repairs / replacements, budget requests, risk management and legal matters.
26. It is anticipated that there will be continued development and introduction of new services and functionality as new systems and processes become available. Once the major phases have developed strong traction we will look to extend into service partnerships with similar organizations such as, Service Ontario, Barrie Public Library and Barrie Police Services.

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**ENVIRONMENTAL MATTERS**

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

**ALTERNATIVES**

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

**Alternative #1** General Committee could decide not to adopt the Customer Contact Centre Business Case.

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

**Alternative #2** General Committee could adopt the Customer Contact Centre Business Case but not the new staff position associated with the knowledge base.

Although this alternative is available, the resulting delay in the development of the knowledge system would be substantial and would delay phase one implementation. This function is not currently being fulfilled across the corporation and needed even without the contact centre.

**Alternative #3** General Committee could delay the implementation of the Business Case or alter the proposed recommendations for phasing.

Although this alternative is available, delaying implementation would result in a loss of confidence with the public and staff as extensive consultation has raised the profile and expectations of this initiative. The phasing has been determined as a result of extensive review with customers and staff.

**FINANCIAL**

29. Costing for this plan focused on the development of direct Contact Centre functionality to support Customer Service and looks to leverage existing systems, staff and technology wherever possible. The capital outlay for the CRM in particular will look to build off of existing corporate pillar technology to ensure compatibility with existing systems and reduce future costs of integration and support.

30. Capital Costs

|               | 2016                             |                 | 2017  |                  | 2018                                      |                  | Totals<br>2016 - 2018 |
|---------------|----------------------------------|-----------------|---|------------------|---|------------------|-----------------------|
| CRM           | RFP Development                  | \$50,000        | Setup and startup use in Contact Centre   | \$350,000        | Expand functionality                      | \$250,000        | \$650,000             |
| Technology    | Monitors & screens               | \$20,000        |   | \$5,000          |   | \$5,000          | \$30,000              |
| Facilities    | Reorganization of existing space |                 | Specific workspace setups to meet functional requirements, additional work spaces | \$200,000        | Additional work spaces, additional wicket | \$200,000        | \$400,000             |
| <b>Totals</b> |                                  | <b>\$70,000</b> |   | <b>\$555,000</b> |   | <b>\$455,000</b> | <b>\$1,080,000</b>    |

31. The Capital investment that is being requested will ensure that the tools and technology that are required for successful operation of a Customer Contact Centre are in place. This investment will allow for continuous development of our services and will help to align our services with our customers' expectations. Technology costs anticipate leveraging existing technology applications to extend customer service functions. The costs for these systems were provided by our Information Technology department and reflect information from our vendors as well as other municipalities.

32. Operating Costs - Anticipated impact to the annual operating budget once full implementation of the contact centre has been achieved will be approximately \$255,000/yr. This does not include the transfer of existing FTE complement and associated budget, which will be net neutral.

| IT Operations                 |                  |   | Access Operations |                  |  | Totals           |
|-------------------------------|------------------|---|-------------------|------------------|--|------------------|
| Communications Infrastructure | \$50,000         | Licensing (2016) Annual Maintenance Fee | New FTE           | \$80,000         | Position to manage Corporate Customer Knowledge    |                  |
| CRM Maintenance (2018+)       | \$75,000         | Annual Maintenance Fee                  | Contracts         | \$30,000         | Additional resources to define and set processes   |                  |
|                               |                  |   | Equipment         | \$10,000         | Headsets, office supplies                          |                  |
|                               |                  |   | Minor Capital     | \$10,000         | Peripherals, message boards, equipment replacement |                  |
| <b>Totals</b>                 | <b>\$125,000</b> |   |                   | <b>\$130,000</b> |  | <b>\$255,000</b> |

33. Operating Funds for 2016 will be required to support in depth planning for the start up of the contact centre and development of the centralized knowledge management system for the Customer Contact Centre. The majority of funds will be allocated to support the reorganization of staff to form the Customer service branch as an operational unit, process mapping, developing the knowledge management system, the development and delivery of training and equipment and services that will be defined through the implementation plan.
34. For 2016 a permanent position will be required to focus on the development of the Knowledge Management system. Consideration for this position is being requested in the 2016 Business Plan.

**LINKAGE TO 2014-2018 COUNCIL STRATEGIC PLAN**

35. The recommendation(s) included in this Staff Report support the following goals identified in the 2014-2018 City Council Strategic Plan:
  - Responsible Spending - Embrace Innovation To Improve How We Do Business
36. The successful implementation of the Customer Contact Centre will result in significant improvements in service efficiency and quality for many every day functions. The benefits to customers will be specific and measureable. Customers will receive timely, responsive service that is convenient and easy to access, resulting in increased satisfaction levels. The customer experience will be streamlined and consistent regardless of what channel the customer chooses to access. Service will be on the customer's terms for when and how they access services.

**APPENDIX "A"**

**Customer Contact Centre Business Plan**

**APPENDIX "B"**

**Customer Service Plan - 2014**

**APPENDIX "C"**

**Presentation to Finance and Corporate Services Committee September 30, 2015**



Appendix “A”

# Customer Contact Centre Business Case

Access Barrie

October 8, 2015

IT'S ABOUT A CITY IMPROVING FOR ITS PEOPLE



# Business Case

## Customer Contact Centre

Access Barrie



October 8, 2015

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## 1. Executive Summary

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

The Customer Service Plan, as approved in principle by Council in September 2014 covered a wide range of services and options. Council gave direction to minimize operating costs where feasible. The costs associated with the plan are mainly related to the development of the Customer Contact Centre. This business case focusses on that portion of the plan.

The Customer Contact Centre will be designed to create a more customer oriented and easily managed model for customer service. It will enhance the service options, provide information to staff and customers, update guidelines, and serve the community in a wide variety of ways through phased in technology and customer service. The contact centre will unify our services, and enhance the ability that the customers and staff have in completing transactions. It will be a one-stop centre for providing quality customer service, by phone, e-mail, online and in person.

The Customer Contact Centre will allow for detail oriented and specifically trained staff to complete everyday general transactions for the customers on the first floor of City Hall. It will allow for customers to manage their own business with ease, while the staff will be able to complete the general dealings and support other departments.

As approved in principle by Council in September 2014, the Customer Service Plan holds the vision for the customer service experience to provide efficient, accessible, enhanced, consistent service, and by treating everyone – customers and employees – with respect. This aligns with the Executive Management Teams' mission of;

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

Access Barrie will work to ensure that the phased service transitions will be seamless to the customer, as well as make the transition smooth for the staff involved. A key underlying principle will be that as services are transitioned from departments into the contact centre, the resources that deliver the service will move with them. It is anticipated that a total of 14 existing staff positions will be transferred to the contact centre from the original departments. One new position is being requested through the 2016 Business Plan. The resource is needed to build and manage the customer information systems that are required for a successful implementation of a contact centre. This function is not an existing capacity within the corporation.

With a Customer Contact Centre the City of Barrie will be able to better serve our customers. Investing in new technologies such as Integrated Communications, Customer Relationship Management and Knowledge Management solutions to gain efficiency and consistency in customer care that will prepare us for the future growth of the City of Barrie.

## 2. Desired Outcomes

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One of the City of Barrie's corporate strategic priorities was to “Improve and Expand Community Involvement and City Interactions” (Strategic Plan 2010 – 2014), as identified by the 2010 to 2014 City Council. The Customer Service Plan that was approved by Council in September 2014 plays a key role in moving us closer to achieving this priority. That plan was built upon the **Key Values** of Knowledge, Respect, Timeliness, Accessibility, and Adaptability with a dedicated focus on customer service and the customer experience.

The **Goals** of the Customer Service Plan are to enhance the accessibility for customer service functions, create a customer centred culture, fill the needs of the average city customer, and provide up to date and easily retrieved information through new technology solutions.

There is a strong business need for information about customers and the services that they use at the City of Barrie. Transactions need to be tracked, analyzed, and monitored to measure customer satisfaction and help enhance the customer service functions and guidelines. This information will also inform future business planning and project development and implementation.

As envisioned in the Customer Service Plan, a **Customer Contact Centre** will;

- Create a Call Centre that merges 40+ existing phone numbers into **ONE central number**.
- Provide a “one stop” customer **Contact Centre** for easy accessibility.
- Expand **mobile solutions** and leverage technology.
- Introduce a consistent **corporate-wide tracking method**.
- Create a **centralized knowledge base**.

## **2.1 Current Decentralized Model**

Our current customer service model is not intuitive to our customers, as the customers are required to know the internal structure of the City in order to reach the department that can complete their request and in turn, each department is equipped to provide customer service along its specific area of responsibility alone. As a result, customers are often not clear on where and how to contact us for the more than 60 services the City provides.

This decentralized model has presented ongoing challenges to the corporation as the availability of defined data and analytics are either not available or inconsistently captured. Our mostly manual or legacy systems do not provide enough information or scope of information to adequately support business decisions in a variety of areas. Information, data and the ability to access, analyze and share it are an integral part to making better decisions, personalizing customer interaction, optimizing operations and innovation.

The current customer service procedures have been optimized to the best of our ability, but are stretched and at capacity. With the expected growth in the south end and increased public expectations, high quality service delivery levels cannot be met with the existing decentralized model.

With a decentralized model, customers have difficulty navigating the multiple points of access which include over 40 public facing phone numbers, 30+ counters, multiple emails with limited options for online or mobile service. Customer expectations are growing and it is now expected that public services match that of the private sector systems and levels.

## **2.2 Moving to a Consolidated Model**

Having a consolidated model for customer service with a consistent approach to handling interactions and service requests through phone, in person and digital channels will provide opportunities for better service to the public and better information for the Corporation to use when planning for the future. Some of the benefits of this model include;

- Single point of access supports citizen centered service;
- Customer and department specific metrics will support business planning;
- Increased capacity to handle future growth;
- Allows for consistent levels of service during the peaks & valleys of demand;
- Dedicated staff resources will be expected to “close the loop” with the customer to increase customer satisfaction;
- Consistency in messaging to the customer through centralized resources and information;
- Reduces opportunities to “work the system” by making multiple requests through multiple channels;

- Easy for the customer;
- Provides for the ability to “backup” departments during peak seasons;
- Councillor support through provision of an accountable, trackable system for customers to be referred to;
- Captures and manages corporate knowledge in a consistent and systematic way.

### **2.3 Why Now?**

Both the Corporation and the customer are changing. There are expectations from the public that customer service channels are efficient and effective and utilize up to date methods and technology. With established technology projects across the corporation, there are expectations within these projects that there will be an ability to integrate the customer experience and transactions across applications. The Customer Contact Centre with the associated technology would be that point of integration.

The City is on the verge of significant growth in population with the development of the south lands. With the influx of people and businesses, the demand and expectations will continue to rise. By making customer service convenient and easy to navigate for both the customer as well as staff, we will be able to focus on first contact resolution. Customers will have their query handled by the person who takes their request, or they will be directed to the correct staff resource the first time. Dedicated, trained customer service specialists will provide quality service in a One Stop Service delivery model.

By having access to accurate information, staff will be able to deliver consistent, efficient, quality interactions that will increase overall citizen satisfaction and will meet the ongoing needs of the Corporation as it grows and develops. The supporting technology will provide work-flow efficiencies that will enhance tracking for future analysis and ensure having an integrated view of the customer and customer interactions. This will provide better data and information for the Corporation for future planning.

## **3. Assumptions & Considerations**

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### **3.1 Assumptions**

In the preparation of this overall Business Case the following base assumptions were considered and informed the underlying thought process:

- Transaction volume for phone calls. It is expected to have 1 - 1.2 calls/capita = 140,000 – 168,000 calls per year – the baseline standards for most municipalities. As Barrie grows, there will be a growth in requests for service. With Barrie’s population growth projection of 210,000 by 2031, it is anticipated that 210,000 – 252,000 annual calls will need to be answered.
- The benefits of consolidation will not be realized if the Contact Centre and technology are not developed together, and technology is required to implement.
- The Customer Service Plan was a Strategic Priority of Council and continues to be a key mission statement of the Executive Management Team.
- Departments will support changes and will supply resources to plan and implement the plan for a fully supported contact centre for customers. Staffing for the contact centre will be achieved through operational efficiencies within the departments.
- Barrie is consistent in its needs, objectives and benefits for customer service as other comparator municipalities. These same models of contact centres are being applied in other municipalities and have yielded the expected beneficial results.

### **3.2 Constraints**

In the preparation of this overall Business Case the following constraints were considered and informed the underlying thought process.

- Resource availability at the corporate and departmental level,
- Accommodation and space allocation for the contact centre,
- Direction from council to limit operational cost increases.

## **4. Technology and Customer Service**

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The key to providing customer service in a contact centre environment is having well defined, integrated technology systems. Communications, Customer Management and Knowledge systems that organize, track customer service delivery, store information and the processes required to complete interactions with the Corporation are key to a successful operation.

The Communications Infrastructure, Customer Management and Knowledge Management solutions are integrated enterprise technologies that are specific to consolidating all channels of customer service in a centralized manner. When integrated with corporate pillar technology such as the Enterprise Resource Planning Systems (ERP), Applications, Permits, Licences and Inspection solution (APLI), CityWorks and GIS systems, the technologies work together to provide easily searched information and automated workflow between the customer request, the department that manages the service, and back to the customer to know the resolution to their issue or concern.

Technology will ensure accuracy, consistency and service quality. Technology will make servicing customers and locating specific information faster and more efficient as it would allow staff to build an easily accessed, comprehensive knowledge system of information specific to the City of Barrie. This would allow for simplification of processes and a consistent approach for common work and automated workflows to reduce inconsistency, errors and speed up processing time.

### **4.1 Communications Infrastructure**

Corporate Communications Infrastructure is foundational/core equipment connecting all City sites with voice communications. The City corporate infrastructure is currently being upgraded to ensure that it meets voice and data communication needs now and in the future. The City of Barrie is moving towards an internet based voice communications solution based on industry best practices. This upgrade of the communications infrastructure will accommodate the City's customer service requirements and allow for the integration into current networking infrastructure. The systems necessary for contact centre operations are part of these planned upgrades.

### **4.2 Knowledge Management**

Knowledge Management can be a major distinguishing factor in determining business success. The ability to create, acquire, retain, store, share, use and manage corporate knowledge long term will allow the City of Barrie to truly optimize services.

Knowledge Management and best practice sharing is good for business as it allows for faster and more effectively shared ideas and information. This allows the city to offer better service, serve our customers and support a committed team of employees by compiling information into a collective knowledge system that staff will have access to for consistent answers and direction. We need to transform information into something valuable, something that employees can access, apply to their jobs and serve our customers.

There is an overall corporate need for this function long term. Currently there are no dedicated positions or functions that build and maintain the knowledge of the corporation in a consistent and systematic way. A dedicated staff position is required to take on the task of working across the organization to identify gaps in knowledge, organize the knowledge, build and maintain that knowledge. This will ensure consistent, up to date information for all staff to access across all customer service platforms.

### 4.3 Customer Management System

In conjunction there must be systems to track and analyze the transactions that result from these customer interactions. A centralized **Customer Management system** will track the volume, type and resolution to all inquiries from all channels, this information can be used to identify trends and emerging issues city wide or neighbourhood specific allowing the Corporation to plan, communicate and work to better enhance those areas and the customer experience consistently.

### 4.4 Benefits of a Contact Centre with a Customer Relationship Management Solution with Knowledge Management

The **Customer Relationship Management (CRM) technology** helps manage all facets of the customer relationship. Combined with an integrated **Knowledge Management (KM)** system, a CRM will support:

- Customer service problem management, trouble ticketing and case management;
- A single view of the customer experience and history (customer data integration);
- Consistent treatment of the customer across channels;
- Real-time decision support (analytics) to understand customer intentions, and customize services and interactions accordingly;
- Real-time feedback and surveys;
- Future self-service systems, including,
  - Creation of issue/service requests online;
  - Web access for status updates/service changes/cancellation of service;
  - Auto notifications on completion of request and customer surveys;
  - Support for online request management, including mobile customers.

Further benefits include:

- **No customer request will be lost** as tracking of all interactions will yield a full history of inquiries and allow automated distribution of requests to the individuals responsible for service fulfillment and analysis. This also allows for review of problem areas and to identify opportunities for process improvements. There would be a centralized corporate view of customers across all channels to allow both the customer and the organization to see all interactions at all levels for better understanding by both parties. This provides a consistent treatment of the customer and supporting “closing the loop” with the customer to know the resolution of their concern and to track customer satisfaction.
- This contact centre will also provide a citizen centred model **to handle future growth** in demand for services as Barrie grows. With the estimated growth to a population of 210,000 by 2031, the resulting demands for service will also increase. Having the Customer Contact Centre may result in cost avoidance, as the staff required to handle the growth will be less in a consolidated model than spread out across several departments. The consolidated model will unify over 40 City phone numbers that will make calling and getting information for customers and easier. Documented procedures and general information in the Knowledge Management System will provide a tool for the delivery of consistent and accurate information to the residents of Barrie.
- Additional value for a consolidated model would be reflected as part of the **Business Continuity Plan**. This would include staffing and plans in the event of service disruptions due to emergencies. Contact centres are a quick and efficient format of conducting business resulting in increases to overall call capacity at a lower cost of operation. The high value of having a central point of contact for residents and staff in emergency situations have been well demonstrated recently through situation experienced by other municipalities such as Calgary’s flooding crisis in 2013.
- City staff will be able to direct **consistent and timely messaging** to one place for events, programs and services, which increases efficiency for staff in all departments due to better time management and availability of information. The single point of contact will be able to provide the City of Barrie with the ability to provide customer service for major events and emergencies in one central contact centre by scheduling

both full and part time staff to meet service demands. It will also make consolidating contacts possible and allow for complaints, wait times, and abandoned rates to be reduced.

The planning for this technology will focus on developing a request for proposals in 2016. Issuing, awarding and implementing the technology would be in 2017 – 2018. Technology would be implemented into the contact centre operations in phases. Without an integrated technology solution, benefits of consolidation will be limited, as the contact centre would still be relying on manual methods to transfer information between a multitude of departments within the city.

## **5. What Will It Look Like?**

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### **5.1 Departmental Reviews**

To fully understand the scope of our current services and what opportunities and constraints were present, a comprehensive review of all customer service counters within the city was completed. The review included:

- Transactions currently being conducted and the staff and technology that deliver customer service;
- Current support systems, knowledge, challenges, and opportunities;
- Recommendations from current staff;
- Impacts to Customers, department & staff;

#### **Overall observations for most areas include:**

- Staff is engaged but tools and technology are not optimized for effective customer service.
- There are inconsistencies in interpretation of Customer Service between service areas.
- There is a need for general and specialized customer service training for staff at all levels to be able to support a consistent vision.
- Specialized areas have very specific training needs that are unique to their customer type.
- Administrative and customer service staff are one and the same and must multi-task with limited options for scheduling, handling peaks and valleys of service demands.
- There is overall support for Contact Centre concept from all levels of staff,
- The Finance customer service area is already operating as a mini contact centre. Finance staff currently provides customer services on a limited basis for several departments including, Bylaw, Transit, Environmental operations and parking services.

The results of the reviews and the resulting recommendations were shared with most Directors with regards to their specific department. This included the list of services and resources to transition. There was strong support throughout the organization and agreement on the recommendations from both Directors and the Executive Management Team.

The results and recommendations from the departmental reviews are reflected in the phasing of services and technology recommendations as part of the overall design of the contact centre business case.

### **5.2 Contact Centre Transition and Development**

The transition to this new consolidated model will take time and must be done in phases. Phasing will ensure that we learn throughout the process, build on successes and ensure quality, consistency and accuracy while meeting the goal of enhancing the customer experience. It is expected that it may take 3 - 5 years or more to fully implement the Customer Contact Centre.

Subject to the support of Council, formation of the contact centre will commence in Q3/Q4 2016 with the blending of the existing switchboard functions from Access Barrie, the Information Desk functions of Legislative services, the front counter transactions from Finance - Revenue Services branch and the



report a problem functionality of Roads, Parks and Fleet. Additional services will be transitioned in phases into the Contact Centre one or two at a time starting in 2017. This process will ensure staff will be thoroughly trained in all aspects of customer care. The full, final schedule will be determined in consultation with department management based on seasonal requirements, need for technical integrations, departmental priorities, legislative requirements and risk mitigation considerations. Access Barrie will work to ensure that service transitions will be unified to the customer, as well as make the transition easy for the staff involved.

### 5.3 Phasing

#### Phase 1 – Form Customer Service Branch

FTE = full time equivalent

| Service  | Transactions to transition | Volume  | Staff to transfer   | Comments   |
|--|----------------------------|---------|---|--|
| <b>Access Barrie</b> – switchboard services  | Phone                      | 76,000  | 2 FTE   | Switchboard services average 30 sec/call                       |
|  | Counter                    | minimal |   |  |
|  | Digital                    | 500     |   |  |
| <b>Finance</b> - tax/water payments, setup preapprovals, receive courier, deposits other dept., cheque pickups, document drop off, sell bid packages, transit passes, parking passes, garbage tags, parking tickets  | Phone                      | 36,000  | 5 Customer Service Rep's<br>1 Support Clerk<br>1 Supervisor | Average 3 minutes/call   |
|  | Counter                    | 34,000  |   |  |
|  | Digital                    | 9000    |   |  |
| <b>Legislative Services</b><br>Welcome functions, Info barrie emails, pet licenses, online event calendar, directing and general information   | Phone                      | limited | 1 FTE equivalent  | Currently filled by 2 PT                                       |
|  | Counter                    | 9000    |   | Directing and general welcome                                  |
|  | Digital                    | 5900    |   |  |
| <b>Roads, Parks &amp; Fleet</b> - general inquiries, report a problem, service requests & general information for winter control, roads, sidewalks, trees, parks concerns, streetlights, traffic signals, sports fields, sewers, parking lots, passes & meters | Phone                      | 7000    | 1 FTE   | Handling of complaints, service requests – est. 2 – 5 min/call |
|  | Counter                    | minimal |   |  |
|  | Digital                    | 2400    |   |  |
| <b>Total Transactions to Transition</b>  |                            | 179,800 |   |  |

#### Phase 2

FTE = full time equivalent

| Service  | Transactions to transition | Volume  | Staff to transfer | Comments                         |
|--|----------------------------|---------|-------------------|----------------------------------|
| <b>Corporate Facilities</b> – general inquiries, concerns and complaints, toilet rebates, Specialized Transit applications, liaison for facility users | Phone                      | 1000    | None at this time | Subject to meeting room bookings |
|  | Counter                    | 1000    |                   |                                  |
|  | Digital                    | minimal |                   |                                  |

|  |         |         |                   |                                  |
|--|---------|---------|-------------------|----------------------------------|
| <b>Recreation</b> – general inquiries, concerns and complaints, Program registration, fees collection, special programs and event info           | Phone   | 2500    | None at this time | Not including Community Centres  |
|  | Counter | 500     |                   |                                  |
|  | Digital | minimal |                   |                                  |
| <b>Engineering</b> – general inquiries, concerns and complaints, adopt a park, collection of fees, commemorative program, community garden plots | Phone   | 1200    | 1 FTE             | Subject to the closing a counter |
|  | Counter | 2500    |                   |                                  |
|  | Digital | 300     |                   |                                  |
| <b>Environmental Services -</b> Landfill section – general inquiries, concerns and complaints, sale of garbage tags, pickup recycling containers | Phone   | 11,000  | 1 FTE             | Most counter will stay           |
|  | Counter | 2000    |                   |                                  |
|  | Digital | 5500    |                   |                                  |
| <b>Total Transactions to Transition</b>  |         | 27,500  |                   |                                  |

**Phase 3** – subject to the Applications, Permits, Licences and Inspections solution implementation (APLI)

| Service  | Transactions to transition | Volume | Staff to transfer | Comments   |
|--|----------------------------|--------|-------------------|--|
| <b>Legislative Services</b> – general inquiries, concerns and complaints, recycle bins, marriage license, burial permits, accept & open courier packages, accept statements of claim, amend voters lists | Phone                      | 6000   | 1 FTE             | Deputy Registrar status required                           |
|  | Counter                    | 6000   |                   |  |
|  | Digital                    | 500    |                   |  |
| <b>Building</b> - general inquiries, concerns and complaints, collection of fees, pickup of issued permits, booking of inspections   | Phone                      | 7200   | to be reviewed    | Subject to APLI and re-review of new systems and processes |
|  | Counter                    | tbc    |                   |  |
|  | Digital                    | tbc    |                   |  |
| <b>Fire</b> – general inquiries, concerns and complaints, fire permits   | Phone                      | Tbc    | None at this time | Fire Permits   |
|  | Counter                    | 2000   |                   |  |
|  | Digital                    | 3000   |                   |  |
| <b>Total Transactions to Transition</b>  |                            | 24,700 |                   |  |

**Phase 4**

FTE = full time equivalent

| Service  | Transactions to transition | Volume  | Staff to transfer          | Comments                      |
|--|----------------------------|---------|----------------------------|-------------------------------|
| <b>Bylaw</b> - general inquiries, concerns & complaints re: to animal control, parking, signs, lottery & business licenses, property standards & zoning, collection of payments. | Phone                      | 23,000  | 2 – 3 FTE – to be reviewed | Subject to APLI and re-review |
|  | Counter                    | tbc     |                            |                               |
|  | Digital                    | minimal |                            |                               |
| <b>Planning</b> – general inquiries,   | Phone                      | 1200    | None at                    |                               |

|  |         |        |                      |   |
|--|---------|--------|----------------------|---|
| concerns and complaints,<br>collection of fees   | Counter | 2000   | this time            |   |
|  | Digital | 600    |                      |   |
| <b>Culture</b> – general inquiries,<br>concerns and complaints, accept<br>applications, registration for<br>events, Cheque pickups, brochure<br>& invoice drop off | Phone   | 3500   | None at<br>this time |   |
|  | Counter | 2000   |                      |   |
|  | Digital | 1500   |                      |   |
| Other i.e. HR, Legal, IT etc.  | Phone   | 1000   | None at<br>this time |   |
|  | Counter | n/a    |                      |   |
|  | Digital | n/a    |                      |   |
| <b>Total Transactions to Transition</b>  |         | 34,800 |                      | A lot of general<br>information services,<br>technical services will<br>still be offered by<br>departments. |

### Phase 5

FTE = full time equivalent

| Service   | Transactions to transition | Volume  | Staff to transfer    | Comments |
|---|----------------------------|---------|----------------------|----------|
| <b>Waste Water</b> – general inquiries,<br>concerns and complaints  | Phone                      | 2000    | None at<br>this time |          |
|   | Counter                    | n/a     |                      |          |
|   | Digital                    | minimal |                      |          |
| <b>Water Operations</b> – general<br>inquiries, concerns and complaints,<br>pool fill requests, Dig Smart locate<br>requests, billing inquiries,<br>construction inquiries, water<br>quality, high consumption<br>concerns, temporary water<br>permits, requests to shut off valves<br>and shut off water | Phone                      | 4000    | 1 FTE                |          |
|   | Counter                    | minimal |                      |          |
|   | Digital                    | 8000    |                      |          |
| <b>Total Transactions to Transition</b>   |                            | 14,000  |                      |          |

### 5.4 Staffing Requirements for the Contact Centre

The Customer Contact Centre team will be built by transitioning an estimated 14 existing positions from a variety of departments. A key underlying principle will be that as services are transitioned from departments into the contact centre, the resources that deliver the service will move with them. This approach will help staff and customers adapt to the new contact centre environment. The redeployment of staff will minimize the impact on the operating budget for the overall implementation costs of the contact centre. This system of consolidated service will better manage routine calls and develop a consistent approach to common work as the contact centre will help manage customer interactions more efficiently and effectively.

#### **Customer Service Representatives and Supervisor**

These existing transferred positions, are key customer service roles for the organization and will answer all service inquiries and provide corporate customer service through all service channels including; phone, email, counter and Web technologies in the centralized contact centre.

The staff complement will be filled by internal transfer of resources that are currently delivering services at the departmental level to the contact centre. Specialized training of these current staff members will ensure that they are better equipped to perform their jobs. This will keep the information and services for customers consistent across all channels.

### **The Knowledge Management Co-ordination**

In reviewing the corporation, there are currently no dedicated positions or functions that capture and manage the knowledge of the corporation in a consistent and systematic way. A staff position is required that would take on the task of identifying our gaps in knowledge, organize, build and maintain that knowledge. This role is required as early as possible in the plan as documenting and building the knowledge system will take considerable time and without it no other technology can be implemented. Funding for this position in 2016 will be included in the 2016 operating budget as a requested new full time position.

### **Major Responsibilities of this new staff position:**

- To assist in the development of a system to track and maintain City of Barrie customer service knowledge and processes for use in a Customer Contact Centre environment.
- To acquire, develop, manage and maintain departmental information in the Customer Contact Centre knowledge system.
- Liaise with department business units' contacts to ensure the knowledge system and CRM are optimized for use by the Customer Service Staff in a manner that support citizen-centred service.
- Create, update and maintain a knowledge system to ensure the latest content and information is always available.
- Continually audit and edit all knowledge system entries to ensure they are accuracy.
- Generate and distribute reports.
- Become a City of Barrie expert to anticipate customer queries.
- Proactively create knowledge system articles to communicate answers and resolutions based on research.

## **6. Municipal Comparators**

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As detailed in the Customer Service Plan (Appendix "C"), thirteen municipalities were studied and were found to have, or were moving towards, integrated **one-stop service counters** offering a full range of municipal services accessible through multiple channels – counter, phone and email. Most front counters serve as the single financial transaction point for the majority of departments and services. These municipalities include; Kingston, Guelph, Brantford, Halton Region, Hamilton, County of Simcoe, Ajax, Markham, Newmarket, Oakville, Ottawa, Kitchener and Oshawa. Some common practices include;

- **Central contact** – In addition to the one-stop service counters, most municipalities also provide one central contact (i.e. one phone number, one email address) as the first point of contact to access City services. The majority of phone services use an initial automated attendant for callers followed by live answer as the next option.
- Some have **extended hours** of operation but the standard times are Monday to Friday from 8:30am to 4:30pm.
- Are using or moving towards **Customer Tracking technology** to consistently track, measure, and report on customer interactions through the use of Customer Management systems with integrated knowledge systems. These systems use computer software applications to manage all aspects of customer interactions within the organization including collecting, storing and analyzing customer information.

## **7. Performance Measures**

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Once the **Contact Centre** and associated technology is operating, real time monitoring and evaluation will be used to ensure service quality. Currently there is no comprehensive data on call volumes, service quality and call types across the organization. Ongoing measurement will ensure that we meet the service levels and performance targets which will be based on industry standards and business needs as well as help with the ongoing growth within the city.

Subject to acquiring the Knowledge and Customer Management technology, typical measurements that will be available will include call handle time, abandon rate of calls, costs of calls, number of calls answered, agent quality and completion, as well as number of service requests. These reports can be customized by department, service type, ward, neighbourhood or overall subject to the needs of the business units, the senior leadership teams or Council.

Performance Measures that may be tracked with the introduction of enhanced online and mobile services include the number of services offered, requested, submitted, transactions completed online, as well as the reduction of expenditures and measures of customer satisfaction. Performance measures will be established as part of each phase of the Contact Centre expansion and will be reported to Council.

## **8. Recommendations**

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### **8.1 Form a Customer Contact Centre**

Phase one of the implementation plan will be to amalgamate the resources from Access Barrie – switchboard services, a portion of the Revenue Branch of Finance, Information desk functions of Legislative Services and service request functions of Roads, Parks & Fleet. The Customer Contact Centre would be a One Stop Service area for most general city services, and would be available on the first floor of City Hall at the existing Finance counter.

Customers would no longer have to navigate the nine floors of city hall as well as other offsite locations to complete their general business as the counter would accommodate most general services. Consolidating the 40+ public facing numbers to 705-726-4242, having a main counter and dedicated email supported by dedicated customer service representatives will allow the provision of first contact resolution. This means, the person who first receives the request provides the service or with more technical requests, will connect the customer with the correct staff person in the correct department the first time.

A Customer Contact Centre will provide consistent service with dedicated staff that will be specifically trained and supported by technology and resources designed to provide a positive customer experience.

### **8.2 Phase in Services**

The transition from a decentralized model to a consolidated model for Customer Service will be a phased implementation to ensure success as staff learn and build off of each phase for better productivity, enhanced customer interactions and support department operations. This phased implementation will also allow the costs associated with the contact centre to be spread over several years to decrease the impact of the financial needs of this project.

Intensive training will ensure a fully informed customer service staff to be able to manage all customer queries. By having dedicated customer service staff handling most general customer queries, department technical staff will be freed up to more effectively manage their time to focus on the truly technical nature of their jobs.

By the final phase of the Customer Contact Centre, 14 existing staff positions and associated services will be transitioned from the original service department into the contact centre where the services will now be offered. This transition is expected to extend over 3 - 5 years.

### **8.3 Develop Technology Solutions to Directly Support Customer Service**

The Customer Contact Centre will be the first point of contact for all service channels including counter, phone, email and social media. The customer service functions use of technology will unify knowledge and track interactions for future processing and analysis. Using the technology of Integrated Communications, Customer Management and Knowledge systems, the contact centre will be able to provide quality, consolidated and consistent service delivery regardless of the channel being utilized. Customers will be able to pay for, request, inquire about, apply for, register for and provide feedback on City programs and services. The dedicated customer service staff will be cross-trained to work in all service delivery channels including, phone, counter and digital platforms as well as trained in a multitude of different departmental information and applications.

The Contact centre's Communications, Customer Relationship Management and Knowledge Management Technology will be utilized to manage calls, retrieve documented procedures and information, record customer contacts and track service delivery history. A key concept is to ensure effective integration with existing corporate pillar technologies.

### **8.4 Develop a Corporate Wide Knowledge System to Support Customer Service**

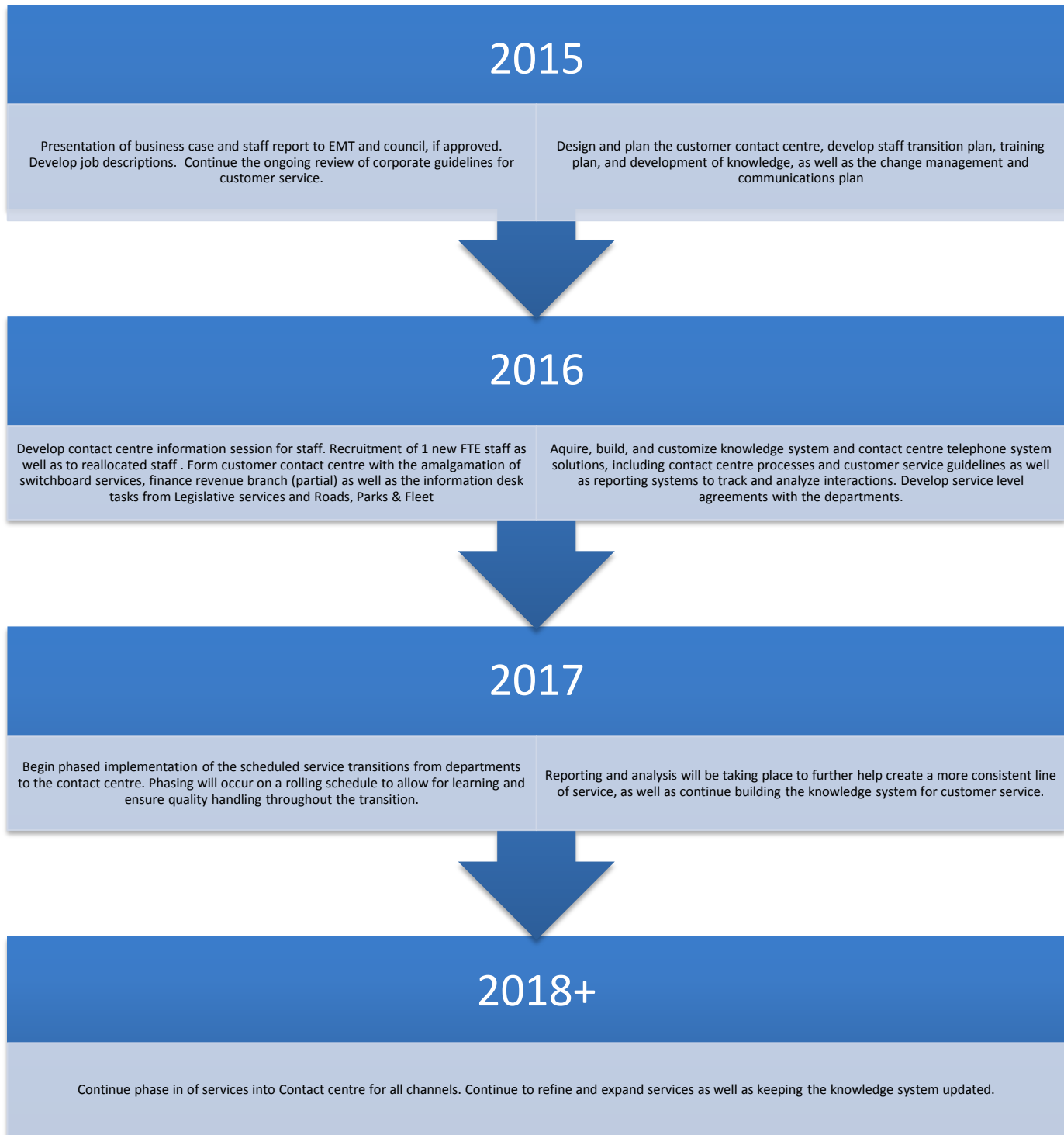
Key to the development of the Customer Contact Centre is the development of the Knowledge system. This function has been started through the research for the overall plan and through various projects across the corporation that are currently in progress. The information is currently in a very rudimentary format and this information must now evolve and be managed in a way that can be functional. Currently this is not existing function of the corporation.

Access Barrie is requesting one new fulltime permanent position as part of 2016 business plan. This position is a key requirement for the contact centre. Key tasks will be to organize the customer service knowledge of the corporation in a consistent and systematic way that supports contact centre functions.

## 9. Putting the Plan in Motion

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If approved by Council as part of the overall 2016 budget and business plan, extensive planning and preparation for first phase implementation will be undertaken.



## 10. Financial Implications

### Anticipated Costs for the Contact Centre

The costing for this plan focused on the development of direct Contact Centre functionality to support Customer Service and looks to leverage existing systems, staff and technology wherever possible. The capital outlay for the CRM in particular will look to build off of existing corporate pillar technology to ensure compatibility with existing systems and reduce future costs of integration and support.

### Financial – Capital Costs

|            | 2016                             |          | 2017  |           | 2018                                      |           | Totals<br>2016 - 2018 |
|------------|----------------------------------|----------|---|-----------|---|-----------|-----------------------|
| CRM        | RFP Development                  | \$50,000 | Setup and startup use in Contact Centre   | \$350,000 | Expand functionality                      | \$250,000 | \$650,000             |
| Technology | Monitors, screens                | \$20,000 |   | \$5,000   |   | \$5,000   | \$30,000              |
| Facilities | Reorganization of existing space |          | Specific workspace setups to meet functional requirements, additional work spaces | \$200,000 | Additional work spaces, additional wicket | \$200,000 | \$400,000             |
| Totals     |                                  | \$70,000 |   | \$555,000 |   | \$455,000 | \$1,080,000           |

The Capital investment that is being requested will ensure that the tools and technology that are required for successful operation of a Customer Contact Centre are in place. This investment will allow for continuous development of our services and will help to align our services with our customers' expectations. Technology costs anticipate leveraging existing technology applications to extend customer service functions. The costs for these systems were provided by our Information Technology department and reflect information from our vendors as well as other municipalities.

### Annual Operating Costs

| IT Operations                 |                  |   | Access Operations |                  |  | Totals           |
|-------------------------------|------------------|---|-------------------|------------------|--|------------------|
| Communications Infrastructure | \$50,000         | Licensing (2016) Annual Maintenance Fee | New FTE           | \$80,000         | Position to manage Corporate Customer Knowledge    |                  |
| CRM Maintenance (2018+)       | \$75,000         | Annual Maintenance Fee                  | Contracts         | \$30,000         | Additional resources to define and set processes   |                  |
|                               |                  |   | Equipment         | \$10,000         | Headsets, office supplies                          |                  |
|                               |                  |   | Minor Capital     | \$10,000         | Peripherals, message boards, equipment replacement |                  |
| <b>Totals</b>                 | <b>\$125,000</b> |   |                   | <b>\$130,000</b> |  | <b>\$255,000</b> |

Anticipated impact to the annual operating budget once full implementation of the contact centre has been achieved will be approximately **\$255,000/yr.** This does not include the transfer of existing FTE complement and associated budget, which will be net neutral.



## **2016 request for funds** (included in overall Financial Implications)

Operating Funds for 2016 will be required to support in depth planning for the start up of the contact centre and development of the knowledge base for the Customer Service Plan. The majority of funds will be allocated to support the reorganization of staff to form the Customer service branch as an operational unit, process mapping, developing the knowledge management system, the development and delivery of training and equipment and services that will be defined through the implementation plan.

Staffing - For 2016 a permanent position will be required to focus on the development of the Knowledge Management system. Consideration for this position is being requested in the 2016 budget.

| <b>Operating Budget Request Access Barrie</b>                            | <b>2016</b>      |
|--|------------------|
| 1 new position in 2016, to support Knowledge Base development (9 months) | \$ 60,418        |
| Minor Capital  | \$10,000         |
| Equipment  | \$10,000         |
| Contracts to define and set process                                      | \$30,000         |
| <b>Operating Budget Request IT</b>                                       |                  |
| Communications Infrastructure Licensing Annual Maintenance Fee           | \$50,000         |
| <b>Capital Budget Request IT</b>   |                  |
| Consultant to support development of RFP                                 | \$50,000         |
| <b>Total</b>   | <b>\$210,418</b> |

The \$210,418 for 2016 is included in current intake forms as part of the 2016 Budget and Business Plan.

## **11. Return on Investment**

The provision of customer service is a core service of the municipality. Up until now, very diverse types of services have been delivered by individual departments in different and unique ways. As a result of these differences a consistent tracking of similar types of statistics and metrics has not been done. This resulting lack of data has made quantifying the potential costs savings and benefits challenging in a true business format.

The following areas represent where significant gains in efficiencies will result in better allocation of resources and where time, effort and costs can be saved for the customer and staff.

- The right resources in the right place at the right time can more easily respond to peak periods.
- Embedded quality service standards can ensure customer satisfaction.
- Consistency of messaging can reduce the possibility of misinformation to the customer and the need for the customer to make multiple requests for the same information.
- Ease of use of a Contact Centre will increase usage decreasing demand on departments. This will allow technical staff to have increased technical capacity rather than the repetitive and time consuming back and forth with customers on a daily basis.
- When customer service technology is integrated with other corporate technology, there is a significant reduction in rework.
- Cost avoidance may be possible as increased efficiency can balance off growth related increases in requests for service.

- A request or inquiry is only handled once. This can increase customer satisfaction as customers do not have to go between several departments or areas for service.
- Contact Centre staff will be specifically trained and dedicated to customer service, leading to the customer feeling supported. This enhances confidence in the Corporation when dealing with the City of Barrie.
- When all calls and interactions are tracked, no customer request is lost. This will increase customer satisfaction and confidence.
- Statistics that will be available will inform future planning including, service delivery enhancements, infrastructure repairs/replacements, budget requests, risk management and legal matters.

The main focus of the contact centre plan is “The Customer”. Providing customers with clear, easy access to information and services will reduce confusion, improve the efficiency and quality for the customer to receive timely, responsive, consistent, easy service that is convenient to them. Online opportunities such as customer portals will also be developed to allow customers to complete more services online. This will lead to increased customer satisfaction. Customer satisfaction has been shown to increase the overall trust and support for the entire organization. The time to answer a query will be reduced due to the availability of information and knowledge. When customer information is retrievable and processes are defined clearly, the likelihood of multiple calls or multiple transfers of a customer is greatly reduced.

All calls are tracked through the CRM and requests for service and inquiries are recorded for action and follow-up in the departments. No customer request will be lost, as every service will be monitored and analyzed. This analysis of calls will provide information that will assist in determining needed communications for programs, services and events. Analysis will also provide information to Managers and senior leadership for future planning including, service delivery enhancements, infrastructure repairs or replacements and budget requests.

Reporting will be available to assess and analyze service requests and service delivery by all input fields such as; street, problem code, received date and completion. Reporting is also available for risk management and for Legal Services to utilized in claims and dispute resolution.

## **12. Alternatives**

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For the development of the business case, other options were explored to determine the best viable option for the city to move towards a strong customer service presence. These options have been studied for what they could or could not accomplish for the city and it’s residents, and in comparison to the customer contact centre would not be successful.

1. Build the Knowledge system but do not integrate a Customer Management Solution.

This option will limit the value of consolidating Customer Service. Without the tracking that a Customer Management program offers, very limited data would be gathered to support future business decisions. There will be no historical tracking of interactions resulting in duplication of work, as multiple similar transactions get actioned independently.

2. Implement tracking software without a Knowledge system.

This option would see no benefit to the customer, as access to information would be even further removed for the staff that is attempting to serve the customer. This will result in no gains in accuracy, consistency or timeliness. Calls will increase, as calls come into the centre they will still need to be transferred to the departments to manage. This would keep creating more work for the departments.

3. Consolidate Service with no supporting Knowledge system or Customer Management system.

This option would see no gains in Customer Service short or long term through consolidation. Calls would increase but would just add an additional layer of process that adds no value to the customer or the Corporation.

4. Maintain the current decentralized model for Customer Service.

This option would result in increased costs as individual departments would struggle to meet the increasing needs of an increasing population with increased expectations.

### **13. Change Management and Communications**

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The Customer Contact Centre is a major change initiative. Like many other organizations, the City realizes that change must be considered as a process, not an event. Consequently, change must be managed in an organized manner.

Change Management emphasizes the “people side” of change. The implementation of a formalized structured Change Management process will enable this project to quickly, and effectively, implement change, and to achieve the required/desired outcomes.

A Change Management Plan for the project will be developed as part of the implementation schedule to;

- Ensure quality outcomes and deliverables that are on time and on budget;
- Ensure proactive communications to customers and staff to minimize and mitigate any negative impacts that may result;
- Support employees affected by the implementation of the Customer Contact Centre and provide specific training that will assist employees in understanding the change with a view towards a shared objective to improve customer service;
- Ensure that employees have the answers and leadership they need throughout the project to address and reduce feelings of anxiety and resistance to change as well as address the overall corporate culture changes that will be occurring.

A full communication plan will be developed in conjunction with the communications and marketing branch to ensure residents are informed about the new and improved options for customer service and all that will be offered as part of the improvements initiatives. The communications plan will include all customer service channels - in person, by phone, email and online.

### **14. Conclusion**

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Creating a centralized model for customer service in the City of Barrie will effectively move the corporation closer to fulfilling the mandate to create a customer centred organization. Through the implementation of the Customer Contact Centre in phases starting in Q3/Q4 of 2016, the centre will constantly evolve over the next 3 - 5 years to be a support to the overall organization and its customers.

Leadership and a shared organizational commitment will be essential for success. The Executive Management Team has a committed mission to customer service that will be realized throughout the Corporation. Dedicated resources will be needed to implement the initiatives that are part of this plan. Successful implementation will require a dedicated time commitment from staff and departments to develop new processes to support the new service delivery model.

Effectiveness cannot be achieved solely through centralization. In order for integrated service delivery to be successful, extensive business process review must continue. The goal will be to reduce turn-around time and improve responsiveness. Opportunities for improvements will be sought so that the front-line

customer service staff can provide good service with clearly defined processes and workflows. It is anticipated that there will be continued development and introduction of new services and functionality as new systems and processes become available. Once the major phases have been completed we will look to extend into service partnerships with similar organizations such as Service Ontario, Barrie Public Library, and Barrie Police Services.

Access Barrie will develop, lead and implement the Customer Contact Centre, but all departments will have the mandate to make customer service a priority. Access Barrie will work with departments to define and document their customer service processes so that a consistency of delivery can be achieved across services and channels of service resulting in an improved customer experience.

The Customer Contact Centre Plan is solidly put together but can be flexible to leverage new and changing circumstances as they present themselves. The Customer Service Plan will continue to be a guiding document for the overall development of a clear culture of customer service across the organization, but the Customer Contact Centre is an important pillar of the overall plan. Realizing this new service delivery method will help to instill a strong culture of customer service and continuous improvement across the Corporation of the City of Barrie.

# Appendix “B”

## Customer Service Plan

September 8, 2014

Access Barrie

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## **INTRODUCTION**

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

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

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

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

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

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

## HOW WAS THE CUSTOMER SERVICE PLAN DEVELOPED?

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

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

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

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

### External Review

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

### Internal Review

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

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

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

## SITUATIONAL ANALYSIS

### What Does Our Community Want?

#### Residents - Current Practices & Future Preferences

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

For full survey results please see Appendix "B"

#### Businesses - Current Practices & Future Preferences

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



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

For full survey results please see Appendix “C”

### What Are Our Peers Doing?

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

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

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

For full chart of review please see Appendix “D”

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

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

#### **STRENGTHS**

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

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

#### **WEAKNESSES/ OPPORTUNITIES**

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

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

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

**Key concerns include:**

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

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

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

*\*estimates*

**Outdated Customer Service Systems**

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

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

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

Inaccurate, outdated content has two primary negative effects:

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

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

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

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

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

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

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

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

### **Customer Tracking**

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

### **Knowledge Management**

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

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

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

### **Customer Service Training**

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

## **CHALLENGES**

### **Tools & Resources**

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

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

### **Growth and Resources**

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

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

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

### **Legislation**

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

### **Contracts**

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

## THE CUSTOMER SERVICE PLAN

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

Our Mission:

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

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

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

### GOALS

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

### GOAL: ENHANCE CUSTOMER SERVICE ACCESS OPTIONS

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

**We will...**

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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

A centralized Customer Management Solution will allow Customers to:

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

A centralized Customer Management Solution will allow Staff to:

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

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

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

**We will...**

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

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

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

## **PUTTING THE PLAN IN MOTION**

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

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

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

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

### **Customer Service Plan Phasing**

#### **2014**

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

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

#### **2015**

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

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

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

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

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

## **2016**

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

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

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

## **2017 and beyond**

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

## Financial Implications

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

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

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

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

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

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

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

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



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

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

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

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

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

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

**5. Creating a Customer Centred Culture**

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

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

**Performance Measures**

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

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

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

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

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

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

Appendix “C”

# Customer Contact Centre

## Business Case

PRESENTED BY

Rebecca James-Reid, Executive Director Access Barrie  
Monique Kovacs, Manager Customer Service

Finance and Corporate Services Committee - September 30, 2015



*Customer Service  
Plan*

# Agenda

1. Where have we been?
  - Customer Service Plan
2. What we've been doing?
  - Business Case
  - Departmental Reviews
  - Recommendations
3. Request for Feedback from Finance & Corporate Services Committee

# Our Mission



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

## Values & Goals

Enhance service options, Create a Customer Focussed Culture, Provide information for staff, Update guidelines, Provide technology solutions

# Customer Service Plan

- Create a Call Centre that merges 40+ existing phone numbers into **ONE number**.
- Enhance **Barrie.ca** and the number of online services.
- Provide a “one stop” customer **Contact Centre**.
- Provide enhanced City Services at **Community Centres**.
- Focus on **1<sup>st</sup> contact resolution**.
- Expand **mobile solutions** and leverage technology.
- Introduce a consistent **corporate-wide tracking** method.
- Create a **centralized knowledge base**.

# Council Direction

- Council approval in principle September 2014
- Limitations to minimize impact on operating budget

# Benefits of a Contact Centre

- Single point of access supports citizen centered service
- Handle future growth & level peaks & valleys
- Consistency in messaging & “close the loop”
- Easy for the customer
- Ability to “backup” departments during peak seasons
- Councillor support
- Capturing and managing corporate knowledge



# Contact Centre - Department Reviews



- Front line review of services & resources in all departments
- Overall observations
  - Staff engaged but tools under utilized
  - Inconsistencies in interpretation of Customer Service
  - Capacity & compatibility of skills and expectations
  - Need for training
  - Multi-tasking with limited backups
  - Overall support for Contact Centre concept
- Director Review of results and recommendations
  - Strong support and agreement on transitions of services and resources

# Knowledge Management

- Best practice is to corporately create, retain, store, share, use and manage knowledge long term
- Currently no dedicated positions or functions that build and maintain the knowledge of the corporation in a consistent and systematic way.
- **The Knowledge Management Co-ordinator** would take on the task of working across the organization to identify gaps in knowledge, organize the knowledge, build and maintain that knowledge.
- Will ensure consistent, up to date information for all staff to access across all customer service platforms

# Customer Management

The Customer Relationship Management (CRM) technology helps manage all facets of the customer relationship. Combined with an integrated knowledge management (KM) system, a CRM will support:

- Customer service problem management, trouble ticketing and case management;
- Real-time feedback and surveys;
- A single view of the customer experience and history (customer data integration);
- Consistent treatment of the customer across channels and media;
- Real-time decision support (analytics) to understand customer intentions, and customize services and interactions accordingly;
- Future self-service, including,
  - Creation of issue/service requests in the order system (via web form);
  - Web access for status updates/service changes/cancellation of service;
  - Auto notifications on completion of request and customer surveys;
  - Support for online request management, including mobile customers.



# Contact Centre Recommendations

- Form Customer Service Branch through amalgamation of customer services in Access Barrie, portion of Revenue Branch in Finance, Information desk function of Legislative Services and service request functions of Roads, Parks & Fleet
- Transition identified departments and services in a phased timeline (by final phase 14 existing staff transitioned over approx. 3 yrs)
- Customer Relationship Management technology in phases
- Development of Knowledge Base
- 1 new FTE request as part of 2016 budget to manage knowledge. Not currently an existing function that could be transferred from within the corporation
- Expand and enhance services with key partnerships in future



# Implementation Plan

## Phase 1 – Form Customer Service Branch

- Access Barrie (switchboard), Finance (portion of Revenue Branch), Legislative Services (information desk functions), Roads, Parks & Fleet (requests & inquiries)
- Phone, Counter, Email – estimate 180,000 transactions

## Phase 2 – Requests and Inquiries

- Corporate Facilities, Engineering, Recreation, Landfill
- Phone, Counter, Email – estimate 27,500 transactions

\* Customer transactions and inquiries only, technical detailed matters remain in all home departments



## Implementation Plan – cont.

### Phase 3

- Legislative Services, Building, Fire (permits)
- Phone, Counter, Email – estimate 25,000 transactions

### Phase 4

- By-law Services, Planning, Culture and other smaller services
- Phone, Counter, Email – estimate 35,000 transactions

### Phase 5

- Waste Water and Water Operations
- Phone, Counter, Email – estimate 14,000 transactions

\* Customer transactions and inquiries only, technical detail matters remain in all home departments

# Business Case



- Return on Investment
  - The right resources in the right place at the right time.
  - Consistency of Messaging
  - Ease of use will increase usage decreasing demand on departments
  - Efficiencies benefits - reduced rework
  - Cost avoidance - increased efficiency balancing growth
  - Increased technical staff capacity
  - Growth Management
  - Request or inquiry is only handled once
  - Work is dedicated to customer service. No wrong number.
  - All calls tracked. No customer request is lost
  - Stats will inform future planning including; service delivery enhancements, capital requests for infrastructure repairs / replacements, budget requests, risk management and legal
- Objectives & Performance Measures
  - Value of metrics – customer satisfaction, save the customer a trip/call



# Financials - Capital

|            | 2016                    |          | 2017   |           | 2018                                      |           | Totals      |
|------------|-------------------------|----------|--|-----------|---|-----------|-------------|
| CRM        | Develop RFP             | \$50,000 | Setup and startup use in Contact Centre                                      | \$350,000 | Expand functionality                      | \$250,000 | \$650,000   |
| Technology | Monitors, screens       | \$20,000 |  | \$5000    |   | \$5000    | \$30,000    |
| Facilities | Reorg of existing space |          | Specific Desk setups to meet functional requirements, additional work spaces | \$200,000 | Additional work spaces, additional wicket | \$200,000 | \$400,000   |
| Totals     |                         | \$70,000 |  | \$555,000 |   | \$455,000 | \$1,080,000 |

CRM has been previously planned for as part of the overall technology infrastructure capital program

Communications Infrastructure – is part of existing project. Minimal additional requirements for 2016



# Financials – Annual Operating 2016

| IT Operations                 |                  |   | Access Operations |                  |  | Totals           |
|-------------------------------|------------------|---|-------------------|------------------|--|------------------|
| Communications Infrastructure | \$50,000         | Licensing (2016) Annual Maintenance Fee | NEW FTE           | \$80,000         | Knowledge Management Co-ordinator                  |                  |
| CRM Maintenance (2018+)       | \$75,000         | Annual Maintenance Fee                  | Contracts         | \$30,000         | Additional resources to define and set processes   |                  |
|                               |                  |   | Equipment         | \$10,000         | Headsets, office supplies                          |                  |
|                               |                  |   | Minor Capital     | \$10,000         | Peripherals, message boards, equipment replacement |                  |
| <b>Totals</b>                 | <b>\$125,000</b> |   |                   | <b>\$130,000</b> |  | <b>\$255,000</b> |



# Next Steps

- Finance and Corporate Services Committee Feedback
- General Committee Oct 19 – Report
- 2016 Budget Requests through various intake forms
- HR transition & training plan
- Rollout to staff subject to Council approval
- Setup and start to populate Knowledge Base
- Begin Implementation Plan - 2016