

Customer Contact Centre

Business Case

PRESENTED BY

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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 **1st 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 13,000 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	
Totals	\$125,000			\$130,000		\$255,000



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