City of Waterloo
Expanded After Hours Call Centre
Recommended Solution Report

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Table of Contents

1. Executive Summary

This report summarizes the results of the City of Waterloo's ("City") provincially funded project "Expanded After Hours Call Centre." This project was completed in three phases (Figure 1):

- **Task 1: Review of the Existing State**. The first phase of the project analyzed the existing state of the City's Customer Service Intake across divisions. This phase was completed from May – July 2022.

- **Task 2: Evaluation of Alternatives**. The second phase of the project used the Task 1 findings to develop alternatives that contribute to a centralized delivery model for the City's call centre and Customer Service Intake processes. This phase was completed from August – November 2022.

- **Task 3: Recommended Solution**. The final phase of the project provided recommendations to support the City in achieving a centralized Customer Service Intake strategy with a focus on After Hours effectiveness, improving cost effectiveness, and increasing the current level of business process maturity. This phase was completed from November – December 2022.

Figure 1. Three Phases of Project Delivery

1. Review of Existing State (May – July)	2. Evaluation of Alternatives (Aug – Oct)	3.Recommended Solution (Nov/Dec)

During Task 1 – Investigation and Analysis of the Existing State, Valency engaged over 50 internal City stakeholders in an analysis of the Customer Service Intake processes across 16 divisions. The analysis showed that the City's process maturity is at a **Level 2 – Developing** (Figure 2). City staff are very committed to achieving service excellence but struggle with a lack of consistency in Customer Service Intake processes, no system of record for Customer Service data, and ad hoc reporting practices across divisions.

Figure 2. City's Existing State Customer Service Intake Process Maturity

Processes	Data	Reports	Tools	People

Maturity Level	Description
1 – Informal	Related processes, data collected, and reporting requirements are ad hoc.
2 – Developing	Generally accepted processes, data collection and reporting requirements are in place, but not documented or consistently followed
3 – Defined	A documented process, data managed in one system-of-record, and defined reports are in place. However, these may not be consistently followed. Roles and responsibilities are defined but may not be fully staffed.
4 – Standardized	A documented process is consistently followed and enforced. The system-of-record is partially integrated with corporate systems and other processes. Most reports are system-generated. There is an adequate staffing level of experienced, trained personnel.
5 – Optimized	Mature, documented process is in place that has been reviewed, updated and improved over time. The system-of-record is fully integrated with other corporate systems with no duplication of data entry. End users can analyze data through a business intelligence tool, and there is continuous improvement focus.

Task 1 estimated the total cost of Customer Service Intake in 2021 to be $5.5M (6% of the 2021 operating budget), with the primary cost driver being staff time for the intake of phone and email service requests.[1]
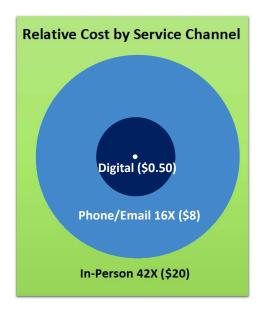
The City lags the broader public sector and has not yet adopted a digital-first Customer Service strategy, although Customers increasingly expect Customer Service to be accessible anytime and online. [2] Significant opportunity for improved cost effectiveness can be realized based on the relative cost savings of high volume and repetitive digital transactions (Figure 3).[3]

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[1] "Existing State Memo, Expanded After Hours Call Centre", Valency Inc., Oct 13 ,2022.
[2] "Omni-Channel Delivery in Government," Institute for Citizen-Centred Service, January 2022.
https://citizenfirst.ca/assets/uploads/research-repository/JC-Report-Jan-2022-EN.pdf
[3] "Creating Customer Contact Centres, A guide for municipalities from Smart Cities", SmartCities, 2011.

Figure 3. Relative Cost by Service Channel

Relative Cost by Service Channel

Digital ($0.50)

Phone/Email 16X ($8)

In-Person 42X ($20)

Task 1 identified 29 opportunities for improvement (Appendix B) that were validated by stakeholders, aligned with project goals, and would contribute to advancing process maturity to **Level 3 – Defined**.

Task 2 – Evaluation of Alternatives began with a review of the 29 opportunities to clarify and group related opportunities and understand inter-dependencies. This exercise identified six alternatives that were presented to the Steering Committee and approved for further evaluation. As directed by the Steering Committee, these alternatives were grouped into three themes (Table 1). External research and a series of Alternatives Development Workshops were conducted to gather feedback from over 50 stakeholders.

Table 1. Alternatives Evaluated

Alternative	Theme	Key Benefit
1. **Corporate Customer Service Leader** New role reporting to the CAO.	Leadership	Leadership for Organizational change
2. **Critical Event Management System Deployment** Existing solution to automate fulfilling urgent staff needs After Hours.	Core Services	Increased After Hours effectiveness
3. **After Hours Intake of Service Requests** Centralize After Hours Customer Service Intake.	Core Services	Increased After Hours effectiveness
4. **List of Services** Compile a complete and structured list of services provided to Customers for internal use.	Core Services	Increased overall effectiveness
5. **Service Channel Best Practices** Implement phone, email, and social media channel best practices.	Core Services	Increased customer satisfaction
6. **Digital Intake of Service Requests** Dramatically increase digital channel utilization.	Process Improvement	Increased overall effectiveness and cost avoidance

The evaluation concluded that all six alternatives are essential for the City to progress to a **Level 3 – Defined** process maturity and achieve a centralized delivery model for enhanced Customer Service Intake. An effective "centralized" delivery model will be dependent on having defined and consistent processes for Customer Service Intake, supported by an effective technology solution. In a post-COVID environment, a "centralized" delivery model no longer assumes the co-location of staff. In a Defined state, there will be process consistency across divisions and available data to understand trends in Customer Service Intake. This state would make it more accessible to get the right information to the Customer in a timely manner.

Task 3 – Recommended Solution included a review of the organizational change considerations and critical success factors. Organizational change considerations include Corporate Management Team and Council commitment, cultural change, and operational change. Critical success factors include internal resource availability and a comprehensive communications plan.

Guided by the Steering Committee, all six alternatives were included in the recommended solution and final cost analysis to understand the financial impact on the current Customer Service Intake arrangement. A phased implementation approach with consideration for dependencies between alternatives was assumed.

Overall, the City has an opportunity to realize a cost avoidance equivalent to $2.5M in Customer Service Intake from 2023 – 2026. This is primarily driven by reduced staff time required to manually process Customer Service requests and increased utilization of the digital service channel. Staff time can be redirected to higher value tasks that align with the City's service excellence guiding principle. The target utilization of the digital channel is 45% of all service requests by 2026 (Figure 4).
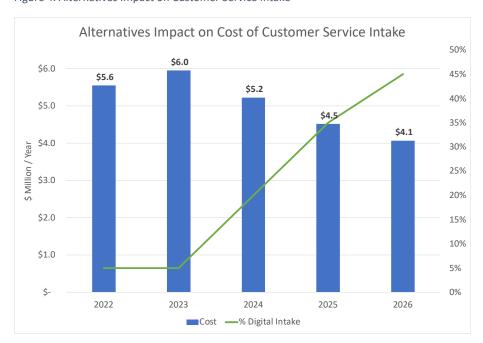
Figure 4. Alternatives Impact on Customer Service Intake

2. Background

2.1 Project Goals

The goal of this project is to assess the viability of a centralized Customer Service Intake strategy and determine the impact on the City's current Customer Service arrangement. This includes an in-depth analysis with After Hours effectiveness being the primary priority and Regular Hours effectiveness being a secondary priority.

2.2 Key Assumptions

Key assumptions that have been carefully considered in our analysis of the City's Customer Service Intake strategy include:

- Maintain or improve the quality of care and Customer-centred contact to residents and visitors (referred to as "Customers" throughout this report).
- Focus on effective utilization of existing technology and gaps that technology could address.
- Maintain current resourcing levels and operating costs.
- Consider each division's Customer Service process to the point where a service request, problem, or feedback has been accepted by the division for action or follow up.
    - Operational processes for each division once a Customer Service request has been initiated and accepted are out of scope.
- Additional out of scope items include the Fire Rescue Emergency Response Customer Service process and internal service requests.

2.3 Definitions

Note: For Cyber Security purposes, actual system names have been replaced with generic system descriptors as listed below.

Term	Definition
After Hours	The period during which a division does not have regularly scheduled staff for the intake of customer service requests. They may have a means of responding to urgent service requests.
City	City of Waterloo
Critical Event Management System (CEMS)	Critical Event Management System (CEMS) used by area municipalities to manage operational response to critical events.
Customer	City residents, business owners, property owners and visitors
Customer Relationship Management (CRM)	The concepts, procedures, and rules that an organization follows when communicating with its customers.
Customer Service Intake	The process to the point where a service request, problem, or feedback has been accepted by the division for action or follow up.

Term	Definition
FDMS	Facility Design and Management Services
Form Builder	System used by Corporate Communications to design and implement website forms
IMTS	Information Management and Technology Services
On-Call Operator	City staff assigned After Hours to dispatch service requests.
On-Call Supervisor/Manager	The designated Supervisor/Manager for a division who supports After Hours service requests, as required.
On-Duty Operator	City staff assigned After Hours to fulfill urgent service requests outside of their regular hours of work.
Permitting & Compliance System (PCS)	Permitting & Compliance System (PCS) used by Municipal Enforcement, Building Standards and Finance
Regular Hours	The period during which a division has regularly scheduled staff for the intake of customer service requests. Regular Hours differ by division, location, and in some cases, service.
Service Management System (SMS)	Service Management System (SMS) used by IMTS to manage internal service requests.
Steering Committee	The Steering Committee providing oversight to this project.
Telephony System	The City's corporate Telephony System used for voice-based communications.
Work Management System (WMS)	Work Management System (WMS) used by City Utilities, Transportation, Facility Design & Management and Parks and Forestry to track service requests and dispatch work orders.

3. Existing State Review

3.1 Methodology

A review of the existing state was completed to analyze Customer Service Intake processes, related costs, and identify the related Customer Information and Customer Service software.

- An **Initiation Meeting** was held on May 16, 2022, to formally kickoff of the project with the Steering Committee.

- **Review of Existing State**
  - Division Small Group Interviews. Small group interviews with division stakeholders were conducted to document existing state processes, including:
    - Regular vs. After Hours Customer Service Intake processes
    - Current staffing levels, skillsets, experience, and training program
    - Supporting software, tools, integration with other systems and gaps
    - Customer information collected and how it is used
    - Customer Service Intake costs
    - Customer Service Intake operational goals and objectives
    - Current Customer Service Intake metrics, method of calculation, and utilization

  - Document Existing State Processes. The project team completed an internal review of the meeting minutes and draft process flow charts from all division interviews. Draft process flow charts were issued for review to all interview participants for feedback to ensure accuracy of their Customer Service Intake processes.

    In parallel, a summary of all software used by the divisions to support their Customer Service Intake processes was compiled and used as a key input to complete the Review of Customer Information and Customer Service Software.

  - Summary of Interview Findings. Recurring themes and opportunities for improvement in the City's Customer Service Intake strategy were identified.

- **Review of Customer Information and Customer Service Intake Software**
  - Critical Event Management System (CEMS). The City of Waterloo currently uses the Alert Waterloo Region service and the supporting CEMS. The primary use of this system is for public safety messages during emergencies and the software's secondary use is to manage the staffing of vacant shifts. This software may have additional potential uses in Customer Service Intake processes.

  - Follow-up interviews were conducted to understand division software functionality, the Telephony System (IMTS) and corporate website tools (Corporate Communications) utilized for Customer Service functions.

- **Progress Workshop**. A Progress Workshop was conducted on July 11, 2022, with the Steering Committee and key stakeholders. The workshop included a summary of interview findings, an inventory of existing services, Customer interactions, opportunities for improvement, and a discussion on After Hours or expanded hours service.

- **Customer Information Workshop.** A Customer Information Workshop was conducted on July 13, 2022, with the Steering Committee and key stakeholders to review the Customer Information and software supporting existing Customer Services processes. A highlight of the workshop was a discussion with stakeholders on steps to address outstanding questions on technical software details that would become key inputs for the next phase of the project.

- An **Existing State Memo** summarized the findings from the analysis of the City's existing state processes.

3.2 Customer Service Intake Maturity

The business process maturity model (Figure 5) provides a method to objectively evaluate the existing state of the City's overall Customer Service Intake processes. Five levels of maturity describe progressive levels of business process maturity from 1 – Informal to 5 – Optimized.

The evaluation included several inter-related elements that contribute to business process maturity:

- Process – ranging from an ad hoc process at the lowest level of maturity, to a fully documented process that is enforced, reviewed, and updated on a regular basis.
- Data – ranging from ad hoc data collection at the lowest level of maturity, to structured data collection in a system-of-record with no duplication of data entry.
- Reports – ranging from an ad hoc approach to reporting at the lowest level of maturity, to defined reporting requirements that are system-generated.
- Tools – ranging from no tools at the lowest level of maturity, to a system-of-record that is fully integrated with other corporate systems and with support for data analysis.
- People – ranging from ad hoc roles, training, and staffing levels at the lowest level of maturity, to defined and documented roles and responsibilities with a structured training program and adequate staffing levels.

Figure 5. Overall Customer Service Process Maturity

Processes	Data	Reports	Tools	People

Maturity Level	Description
1 – Informal	Related processes, data collected, and reporting requirements are ad hoc.
2 – Developing	Generally accepted processes, data collection and reporting requirements are in place, but not documented or consistently followed
3 – Defined	A documented process, data managed in one system-of-record, and defined reports are in place. However, these may not be consistently followed. Roles and responsibilities are defined but may not be fully staffed.
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5 – Optimized	Mature, documented process is in place that has been reviewed, updated and improved over time. The system-of-record is fully integrated with other corporate systems with no duplication of data entry. End users can analyze data through a business intelligence tool, and there is continuous improvement focus.

The City's existing state Customer Service Intake process maturity is at a level **2 – Developing** based on these findings:

- Process. Although each division clearly articulated how their Customer Service Intake process works, there is no cross-departmental consistency in these processes or a shared Customer Service Intake strategy. Most divisions do not have a formally documented Customer Service Intake process or formal objectives.
- Data. Many divisions are collecting data to support their Customer Service Intake process. However, data is tracked in several disparate software applications, spreadsheets, and manual logs. There is no corporate system of record for Customer Service data.
- Reports. Reporting requirements are ad hoc across divisions.
- Tools. Multiple software applications with varying levels of support for tracking Customer Service requests are used across divisions with limited system integration.
- People. Staff are committed to achieving service excellence and are aligned with the City's Service Excellence guiding principle.[4] However, Customer Service roles, responsibilities and training requirements are not consistently defined.

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[4] City of Waterloo, December 2021, *City of Waterloo 2019-2022 Strategic Plan*, https://www.waterloo.ca/en/government/strategic-plan.aspx

3.2.1 Process

1 – Informal	**2 – Developing**	3 - Defined	4 – Standardized	5 - Optimized
	Generally accepted processes			

Customer Service best practice includes consistency in a Customer Service strategy across the entire organization.[5] For a municipality, consistency means ensuring Customers are treated the same each time they interact with the City, regardless of the division or representative with which they interact.
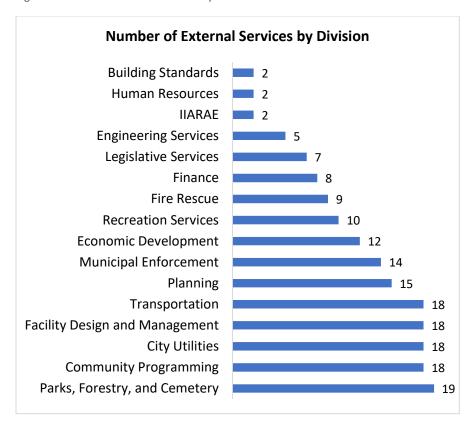
Achieving consistency in Customer Service Intake is not simple. Our analysis identified 177 external services delivered across the 16 divisions interviewed (Figure 6). These services are listed by division in Appendix A. Inventory of Existing Services. A 2011 Smart Cities report "Creating Customer Contact Centres"[6] highlighted that an average European municipality has 200 – 300 different products and services. Given the City is part of a two-tier municipality with some services delivered by the upper tier municipality the Region of Waterloo, the inventory of external services identified through our interviews is in line with expectations.

Processes are at level **2 – Developing.** The feedback collected from the interviews showed a lack of process consistency in how Customer Service is delivered across divisions – both in Regular Hours and After Hours processes.

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[5] "The three Cs of customer satisfaction: Consistency, consistency, consistency," McKinsey & Company, March 1, 2014, https://www.mckinsey.com/industries/retail/our-insights/the-three-cs-of-customer-satisfaction-consistency-consistency-consistency.

[6] "Creating Customer Contact Centres, A guide for municipalities from Smart Cities", 2011, Smart Cities.

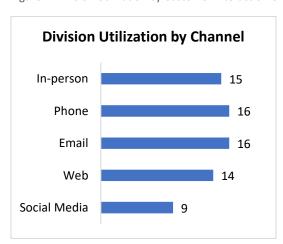Figure 6. Number of External Services by Division

Number of External Services by Division

Division	Number
Building Standards	2
Human Resources	2
IIARAE	2
Engineering Services	5
Legislative Services	7
Finance	8
Fire Rescue	9
Recreation Services	10
Economic Development	12
Municipal Enforcement	14
Planning	15
Transportation	18
Facility Design and Management	18
City Utilities	18
Community Programming	18
Parks, Forestry, and Cemetery	19

Regular Hours

During Regular Hours, phone, email and in-person Customer interaction channels are supported by most divisions (Figure 7). Many divisions are increasing their utilization of Form Builder for web portal submissions. Social Media has also become an important channel coming out of the COVID pandemic. Data to calculate transaction volumes by channel is not tracked by divisions to support further analysis to identify the level of utilization.

Figure 7. Division Utilization by Customer Interaction Channel

Division Utilization by Channel

Channel	Number
In-person	15
Phone	16
Email	16
Web	14
Social Media	9

Interview feedback showed a lack of process consistency across channels. Representative examples include:

- Phone
  - Across the 16 divisions, 14 Regular Hours processes for the phone channel of Customer interaction were captured.

  - There are a significant number of phone numbers (40+) on the City website for external services. Customers make their best effort to select the right phone number, but many service requests are initially received by the wrong division. Transferring phone calls between divisions impacts efficiency and diminishes the Customer Service experience.

  - Most divisions utilize the Telephony System as their primary phone for staff, but with significant variations in how core Telephony System functions are utilized.

    - Auto Attendant. Some divisions have an Auto Attendant configured, providing Customers with a menu of options to select the most appropriate Customer Service Rep or individual.

    - Hunt Groups. Some divisions have a Hunt Group configured, allowing multiple staff to be reachable through one designated phone number. In contrast, several divisions direct callers to specific employee phone numbers. This has the potential to cause delays in responding to service requests when an employee is in meetings, out of the office, sick, or on vacation.
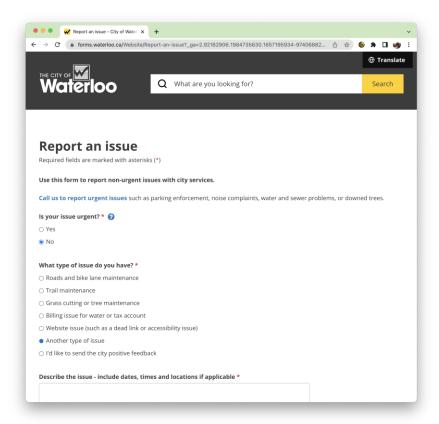- Email
  - Many shared email accounts (35+) are monitored by multiple staff within a division. However, several instances were identified where staff use their individual work email (firstname.lastname@waterloo.ca) to communicate with Customers. This has the potential to cause delays in closing a service request when an employee is out of office. Personal email exchanges are also difficult to track and skew volume data and performance reporting that is critical for accurate forecasting of workload and scheduling of staff.

- Web
  - The deployment of Form Builder for Customers to submit service requests using the web has recently increased in several divisions. Most divisions forward service requests submitted via Form Builder to a shared email that is monitored and responded to in a timely manner. However, there is no City standard or guideline on how web forms should be configured.
  - The most easily accessed web form for Customers is the "Report an Issue Online", found on the footer of most web pages (Figure 8). However, Customers can only select from six types of issues compared to the 177 services identified through interviews.

Figure 8. Waterlo.ca "Report an Issue Online" web form

- Social Media
  - In general, After Hours posts to social media are responded to during Regular Hours. However, a few divisions will post to social media (e.g., event cancellations) and monitor posts After Hours.

After Hours

After Hours service is provided by six of the divisions interviewed. Each of these divisions have significant variations in their After Hours processes. However, our findings have been grouped in two primary methods:

1. **Area Municipality Customer Service Centre** - City Utilities, Transportation, Parks, Facilities and Recreation.

   The City has a contract with an Area Municipality Customer Service Centre to accept re-directed phone-based service requests Monday - Thursday from 3 PM – 7 AM, and Friday 3 PM to Monday at 7 AM.

   The Area Municipality Customer Service Centre is responsible for the basic triage of Customer Service requests and determining where the call should be relayed to, depending on the type of request, time of year and time of day. Service requests can be relayed to an:

   - On-Call Operator

- One On-Call Operator supports City Utilities, Transportation and Parks.
- A second On-Call Operator supports Facilities and Recreation.
- On-Call Supervisor/Manager
- Afternoon shift (City Utilities Maintenance Operator)

Several inconsistencies exist between divisions in staffing practices for On-Call Operators, On-Call Supervisors/Managers, and afternoon shifts.

- On-Call Operators (responsible for dispatching service requests)
  - City Utilities, Transportation and Parks – the On-Call Operator covers 11 PM – 7 AM.
  - Facilities and Recreation – the On-Call Operator covers 3 PM – 7 AM.

- On-Call Supervisors/Manager
  - City Utilities has one On-Call Supervisor/Manager who receives an on-call premium.
  - Transportation has one On-Call Supervisor/Manager from November to April who receives an on-call premium. However, from May to November, Managers/Director monitor and respond to emails After Hours without an on-call premium.
  - Parks has one On-Call Supervisor/Manager from December to March who receives an on-call premium. However, from April to November, there is no official On-Call Supervisor/Manager to support Parks staff working an afternoon or evening shift.
  - Facilities has two On-Call Supervisors/Managers (one for Facilities, one for Security), each receiving an on-call premium.

- Afternoon shift (operational staff that respond to a service request)
  - City Utilities have three staff on regular afternoon shifts that covers 3 PM – 12 AM.
  - Transportation operates on a 24-hour basis from November to April and has specific processes to deal with snow events. During the remaining months, Transportation relies on the City Utilities afternoon shift to respond to service requests until the On-Call Operator starts at 11 PM.
  - Parks has seasonal operational shifts. During the summer, Parks has an afternoon, as well as weekend shifts. For 12 weeks during the winter months, it operates on a 24-hour basis for snow events.
  - Recreation has staff working varying hours by location and program, with many Facilities staffed until 11 PM.
  - Facilities does not have an afternoon shift.

When an On-Call Operator receives a request, they must first confirm if the service request warrants immediate attention or can be deferred for follow-up during Regular Hours. For service requests that require immediate attention:

- Monday - Thursday, the On-Call Operator manually makes sequential phone calls to a roster of 10 - 25 people (depending on the division) until they secure a staff member who is available and willing to respond. If no staff respond or accept the service request, the On-Call Operator calls a Supervisor/Manager.
- Weekends (Friday from 3 PM to Monday at 7 AM) processes differ from Monday – Thursday and are inconsistent between the divisions.

2. **Waterloo Regional Police Service Dispatch - Municipal Enforcement**

   Municipal Enforcement has an agreement with the Waterloo Regional Police Service (WRPS) Dispatch to intake noise complaints and parking service requests Monday - Thursday from 4:30 PM – 8:29 AM, and Friday at 4:30 PM to Monday at 8:29 AM. WRPS dispatch is responsible for triaging these requests for safety concerns and then dispatching the request to the City's Overnight By-law Officer over the WRPS radio.

   Generally, the service request details provided by police dispatch are insufficient to determine next steps and require the Overnight By-law Officer to make a follow-up call to the Customer to obtain all necessary request details. The Overnight By-law Officer inputs the service request into the Permitting & Compliance System (PCS) and closes the service requests once it is addressed.

Several issues and frustrations with After Hours processes were shared by staff during the interviews:

- City Utilities, Transportation, Parks, Facilities and Recreation
    - The Area Municipality Customer Service Centre does not provide On-Call staff with adequate information on service requests (e.g., full address, details of the situation, level of urgency) thereby requiring the On-Call staff member to make a follow-up call to the Customer to obtain the necessary details to determine next steps.
    - The On-Call Operator is often not clear who to call when, what is considered an emergency, and how they should respond.
        - The responsibilities of the On-Call Operator for Facilities and Recreation are particularly complicated because of the significant number of services that are addressed After Hours.
    - On-Call Operators are required to manually make sequential phone calls, sometimes to up to 25 people, to find someone who is able to respond. This can cause frustrations when there is a service request requiring immediate attention.
    - There are times when operational staff are called in After Hours only to find out that someone on an afternoon shift is or was available.
    - The Area Municipality Customer Service Centre typically only has one Customer Service Rep to respond to After Hours calls, but can add additional staff. During unanticipated major events like the windstorm on May 21, 2022, many Customers were calling at the same time but only one Customer phone call at a time was addressed, with all other calls being dropped (no queue, no voicemail).
- Municipal Enforcement
    - Customers calling WRPS dispatch often experience long wait times, thus impacting Municipal Enforcement's ability to respond to service requests in a timely manner.
    - WRPS does not have access to the PCS and limited information is communicated to the overnight by-law officer. This results in an increased workload for the by-law officer.

3.2.2 Data

1 – Informal	**2 – Developing**	3 - Defined	4 – Standardized	5 - Optimized
	Data collection via many disparate systems			

Data collection and analysis is a crucial component of a Customer Service strategy. Data is an integral part of the planning and development of services. Structured, high-quality data on service requests is needed to create volume forecasts, determine optimal staffing levels, and set/meet service objectives for full resolution of service requests.

Best practices for government Customer Service Intake processes includes data collection and analysis to support four Key Performance Indicators (KPIs):

- Cost per transaction - how much does it costs each time a Customer requests the service
- User satisfaction - percentage of Customers that are satisfied with their experience
- Completion rate - percentage of transactions that are successfully completed
- Digital take-up - percentage of Customers that choose a digital channel to complete their task over non-digital channels

Data is at level **2 – Developing.** Many of the software applications used by divisions to support their Customer Service processes have data collection and reporting capabilities. However, no formal data collection requirements exist, and these capabilities are only used on an ad hoc basis. Customer Service data resides in multiple disparate software applications, in unstructured Excel spreadsheets, and in some cases in manually maintained notes.

Follow-up is recommended during the Evaluation of Alternatives phase of this project to define a formal data collection strategy to support analysis of fundamental Customer Service KPIs.

3.2.3 Reports

1 – Informal	2 – Developing	3 - Defined	4 – Standardized	5 - Optimized
Ad hoc reporting requirements that vary by division				

Reports are at level **1 - Informal**. Divisions that utilize the WMS and the PCS to track service requests do collect data to support Customer Service reporting, but reporting practices are still informal.

3.2.4 Tools

1 – Informal	**2 – Developing**	3 - Defined	4 – Standardized	5 - Optimized
	No system of record for Customer Service, many disparate systems			

The City does not have a system-of-record technology, commonly referred to as a Customer Relationship Management (CRM) software, to support a Customer Service strategy. This major gap is hindering the City's ability to address foundational elements of a Customer Service Intake process including process automation, data management, tracking, and reporting.

Tools are at level **2 – Developing**. There are many software applications and services currently used to partially support Customer Service processes. For the most part, these are disparate software applications with limited integration.

A subset of the software applications and services were identified as "candidates" for increased utilization in delivering Customer Service. Divisional staff, supervisors and managers shared their functional use of each software and service. The relevant functional capabilities to investigate during the Evaluation of Alternative phase were noted.

3.2.5 People

1 – Informal	**2 – Developing**	3 - Defined	4 – Standardized	5 - Optimized
	Generally understood roles and responsibilities but not documented			

People are at level **2 – Developing**. Staff interviewed expressed a commitment to achieving service excellence that aligns with the guiding principles of the City's Strategic Plan (Figure 9). However, there is inconsistency in the definition of Customer Service roles and responsibilities and training across divisions.

"We are committed to providing exceptional service that meets the needs of citizens, stakeholders, employees and volunteers of the city."

Roles & Responsibilities

Most divisions do not have documented Customer Service objectives, procedures, call scripts or checklists to support Customer Service consistency. This makes it challenging for Customer Service staff to understand the expectations of their role and obtain meaningful feedback from their Supervisor. It also contributes to inconsistencies in what Customer information is captured and how service requests are triaged.

There is no formal process (survey) in place to collect feedback from employees engaged in providing Customer Service. This feedback would provide the ability for Supervisors and Managers to assess the level of employee engagement, job satisfaction, identify gaps and opportunities for improvement, and gain an understanding of the training and development needs of their employees.

Training

In some divisions, Supervisors provide onboarding Customer Service training and conduct routine, informal coaching. Technical and program training for new Customer Service staff is typically conducted by the leader or a veteran Customer Service Representative (buddy system). Cross training of Customer Service staff is conducted in some divisions but not all, resulting in an inconsistent ability across the City to correctly re-direct service requests for another division. Ongoing Customer Service and soft skill training is optional for Customer Service staff in most divisions.

Most Supervisors and Managers interviewed have not received formal Customer Service leadership training (i.e., performance coaching, call quality checks, soft skill improvement). Customer Service leadership training is key to achieving increased consistency among Supervisors and Managers in their ability to provide coaching and measure employee performance.
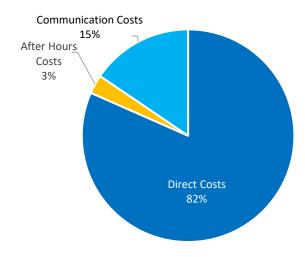
3.3 Cost Analysis

Determining the current cost of Customer Service Intake can be accomplished multiple ways, depending on the available data. Today, the City does not consistently track service request data. Therefore, a time-based, qualitative costing approach was used to estimate 2021 direct costs, After Hour costs and communication costs.

Cost of Delivery	FTEs	Cost
Direct Costs	51.5	4,524,022
After Hours Costs	-	159,570
Communication Costs	3.5	860,487
TOTAL COST	**55**	**$5,545,079**

The total cost of Customer Service Intake in 2021 is estimated at $5.5M[7]. This was delivered by an estimated 55 FTEs. The primary cost driver is Direct Costs or staff time, representing 82% of the total cost of Customer Service Intake (Figure 10).
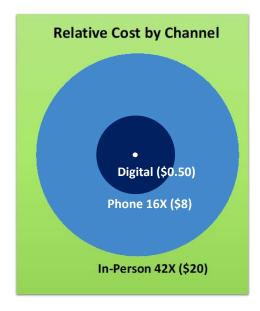
Figure 10. Percentage Breakdown of Customer Service Costs

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[7] Direct Costs and FTEs related to Customer Service Intake were not provided by Building Standards and Economic Development.

Industry wide, the greatest opportunity for Direct Cost savings is through the adoption of a **digital-first Customer Service strategy**. Many international studies have been published, translating to a relative cost of $0.50 for a digital transaction, compared to $8 for a phone transaction and $20 for an in-person transaction (Figure 11).

Figure 11. Relative Cost by Customer Interaction Channel (Canadian Dollars)

Relative Cost by Channel

Digital ($0.50)

Phone 16X ($8)

In-Person 42X ($20)

Direct Costs

Direct Costs represent the estimated staff time, by position, for Customer Service Intake. Time is translated into full-time equivalents (FTEs) and applied to the respective position's salary and benefits.

Cost Element	FTEs	Cost
Economic Development (1)	-	-
Finance	3.6	$302,671
Legislative Services, IIARAE	3.1	$326,506
Human Resources	0.2	$20,808
Fire Rescue (Non-Emergency)	0.7	$57,276
Municipal Enforcement	7.0	$709,376
Recreation Services	20.2	$1,444,247
Community Programming and Outreach Services	2.2	$181,812
Parks, Forestry and Cemetery	8.9	$883,182
Facility Design and Management Services (2)	1.1	$188,338
Transportation	0.3	$40,174
City Utilities (3)	1.1	$124,071
Building Standards (1)	-	-
Engineering Services, Planning	0.9	$67,942
Service Centre (4)	2.3	$ 177,619
TOTAL DIRECT COSTS	**51.5**	**$4,524,022**

Notes/Assumptions:

1. Estimated staff time is not available for Building Standards and Economic Development.
2. FDMS direct costs includes 50% of the contracted Security Guard at City Hall's time attributed to Customer Service Intake.
3. A City Utilities manager indicated 10% of his time was spent on Customer Service Intake. The same percentage is applied to all other management positions in City Utilities.
4. Service Centre provides Customer Service Intake on behalf of City Utilities, Transportation, Facilities, Parks and Forestry.

After Hours Costs

After Hours Costs relate to providing Customer Service Intake outside of Regular Hours. This includes the After Hours contract with the Area Municipality and the various on-call and on-duty costs for staff and Supervisors/Managers who are responsible for providing After Hours Customer Service. It does not include any operational cost associated with fulfillment of service requests After Hours.

Cost Element	Costs
On-Call Operator Costs	$52,130
On-Duty Operator Costs (1)	$20,800
On-Call Supervisor/Manager Costs	
City Utilities	$15,600
Transportation (2)	$6,240
Parks (3)	$3,600
Facilities	$31,200
Area Municipality Call Center Contract	$30,000
TOTAL AFTER HOURS COSTS (4)	**$ 159,570**

Notes/Assumptions:

1. On-Duty Operator costs are attributed to costs incurred on weekends by City Utilities.
2. Transportation After Hours costs are for five months (winter).
3. Parks After Hours costs are for three months (winter).
4. After Hours costs do not include overtime costs.

Communication Costs

Communication Costs represent the annual operating costs for communication systems (desktop phones, cell phones, licensing and maintenance costs for the corporate phone system, Web Portal costs) and estimated staff costs for support of communication systems.

Cost Element	FTEs	Cost
Communication System Costs	-	
Phone Service Provider (1)	-	$158,400
SIP Voice Lines	-	$44,000
License & Equipment Maintenance	-	$81,000
Telephony System Vendor	-	$201,000
Web Portal (2)	-	-
Subtotal	-	$484,400
Communication System Support Costs		
IMTS	1.0	$111,846
Corporate Communications	2.5	$264,241
Subtotal	3.5	$376,087
TOTAL COMMUNICATION COSTS	**3.5**	**$860,487**

Notes/Assumptions:

1. Includes approximately 500 cell phones.
2. Web Portal costs attributed to Customer Service Intake have not yet been provided

3.4 Opportunities for Improvement

Many opportunities for improvement were identified during the evaluation of the existing state. Filtering criteria were applied to ensure the opportunities identified to carry forward into the Evaluation of Alternatives phase:

- Align with section 2.1 Project Goals:
  - o Assess the viability of a centralized Customer Service strategy and the impact on the City's current Customer Service arrangement.
  - o In-depth analysis of After Hours effectiveness
  - o In-depth analysis of Regular Hours effectiveness

- Align with the Customer Service Process Maturity and support the City in progressing from a level **2 – Developing** to level **3 – Defined** business process maturity level. This includes steps that will support the City in achieving:
  - o Documented and consistent Customer Service Intake processes across the City
  - o One system-of-record for Customer data
  - o Defined Customer Service performance reporting requirements
  - o Defined roles and responsibilities for Customer Service staff

The opportunities for improvement are listed in Appendix B and include the associated level of organizational engagement required during the Evaluation of Alternatives phase and the related project goal.

Out of Scope
Additional opportunities for improvement that align with the filtering criteria but are considered "operational processes" and therefore out of scope include:
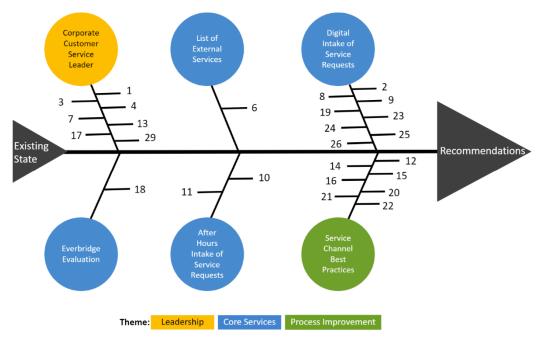
- Conduct a cost/benefit analysis of an afternoon shift to address Facilities service requests (the only division with an After Hours process, but no operational support via an afternoon shift).
- Develop call scripts to improve consistency in On-Call Operator triage of After Hours service requests for City Utilities, Transportation, Parks, Facilities and Recreation.

4. Evaluation of Alternatives

4.1 Methodology

The evaluation of alternatives was completed to further develop identified opportunities that would address a centralized delivery model for the City's call centre and Customer Service processes. The main steps in the process included:

- **Develop Alternatives**. The project team started with the 29 opportunities for improvement identified in Task 1 (Appendix B) and worked to clarify, group related opportunities, and understand inter-dependencies. This resulted in the diagram depicted below, where the numbered Task 1 opportunities roll-up to broader alternatives. Six alternatives (Figure 12) were identified and presented to the Steering Committee on September 7, 2022, for feedback. All six alternatives were approved to proceed to the next step.

Figure 12. Identified Alternatives and Related Opportunities for Improvement (Appendix B)

- **Alternatives Development Workshops.** Collaborative workshops and research were completed to further develop the requirements and approach for each alternative.

- **Internal Review of Alternatives Workshop Feedback.** The project team reviewed the feedback from the workshops and sequenced the alternatives to create a phased implementation approach.

- **Alternatives Workshop**. A workshop was held with the Steering Committee on November 2, 2022, to review the workshop results and the proposed implementation plan.

- **Develop Preliminary Cost of Alternatives.** A preliminary cost analysis was completed for each alternative, resulting in a high-level estimate of costs and savings. Costs focused on internal staff time, software / licensing costs, and external costs.

- **Alternatives Cost Workshop.** A workshop was held with the Steering Committee and a representative from the Finance division on November 8, 2022, to share the cost of the alternatives and receive feedback.

- A **Call Centre & Customer Information Alternatives Report** summarized the alternatives evaluated, alongside their implementation requirements and cost information.

- An **Alternatives Report Meeting** was held on November 24, 2022, with the project team to share the report and receive feedback.

4.2 Findings

4.2.1 Leadership

Corporate Customer Service Leader

Background

A Corporate Customer Service leader is a senior director role that is crucial to improving Customer Service delivery for the City. Currently, City services are delivered across the organization, but Customer Service is managed by individual service areas with no cross-functional oversight.

The City's Strategic Plan references the commitment "to provide exceptional service that meets the needs of citizens, stakeholders, employees and volunteers of the city".[8] However, there is no designated person or area tasked with guiding and implementing the necessary Customer-centric service standards, performance measurements and commitment to continuous improvement required to ensure the strategic goal of service excellence is met.

External Scan

An external scan of comparable sized Canadian municipalities was performed to understand similar job position titles, corporate reporting structure, and salary range of established Corporate Customer Service Leaders. Table 2 displays a summary of these findings.

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[8] City of Waterloo, December 2021, *City of Waterloo 2019-2021 Strategic Plan*, https://www.waterloo.ca/en/government/strategic-plan.aspx#Service-excellence

Table 2. External Scan of Canadian Municipalities

Municipality	Title	Reports to
City of Kitchener	Director of Corporate Customer Service	Community Services
Regional of York	Program Manager of Corporate Customer Service Strategy	*Data Unavailable*
City of Brantford	Director of Communications, Community Engagement, and Customer Service	CAO
City of Calgary	Director of Customer Service and Communications	People, Innovation, and Collaboration Services
City of Windsor	Senior Manager of Communications and Customer Service	Community Services
City of Winnipeg	Director of Customer Service and Communications	CAO
City of Burlington	Executive Lead of Customer Experience	City Manager's Office
City of Kingston	Director of Communications and Customer Experience	Corporate Services
City of Guelph	General Manager of Strategic Communications and Community Engagement	CAO

Of the nine Corporate Customer Service Leader positions identified, three roles are exclusively Customer Service focused, while six are blended roles with Communications.

The reporting structure varies, but almost half of the Corporate Customer Service Leaders report directly to the CAO. This is the ideal organizational structure for a Corporate Customer Service Leader to provide guidance to the entire organization, not just one service area or division. This can help divisions move away from the silos which make cross-departmental communication difficult.

The salaries of the Corporate Customer Service Leaders range from $130,789 - $203,660, which is representative of a Senior Director level position. However, it is noted that some employees in this role have held this position, or another Senior Director position, for multiple years. Therefore, this salary range does not necessarily reflect the starting salary.

Proposed Approach

There are a variety of models that have been successful in other government organizations for adding a Corporate Customer Service leader. To create a solution specific to the City, we recommend a two-step approach:

Step 1. Temporary Position (two-year assignment/contract)

A two-year temporary position, reporting to the CAO, would be tasked to work with all City leaders to develop a made-in-Waterloo Customer Service strategy. This Customer Service strategy should be aligned with industry best practices and the latest public sector service culture innovations while also

meeting the expectations outlined in the City's Strategic Plan. This role would be best suited for an existing senior leader who could be seconded to the position. Alternatively, the temporary position could be filled by an external candidate through a recruitment process. Appendix C provides a draft secondment job description for a Corporate Customer Service Leader.

Key deliverables for Step 1 should include:

- Development of a Customer Service implementation plan with short-term and long-term objectives
- Defining Corporate Customer Service metrics
- Defining Customer Service roles and responsibilities
- Developing the organizational structure for a permanent leadership position and other key Customer Service roles
- Defining Corporate Customer Service standards in collaboration with all divisions
- Leading the organizational change management process

Step 2. Permanent Position

Once the two-year seconded leader has developed the Customer Service Strategy, a permanent Corporate Customer Service Leader would be tasked with carrying on the normal operations as developed in the first two years. This position could be a new, stand-alone position focused on Customer Service or could be integrated into an existing senior leadership portfolio. A critical success factor will be an ability to align the organization with a Customer-centric culture to break down silos and ensure a consistent Customer experience across all departments. This includes ensuring there is a unified vision across the City to serve all Customers.

This position should include responsibility for:

- Designing learning and development content to ensure all staff have the tools needed to provide the best Customer Service
- Ensuring Customer-centric values are designed and integrated into processes such as recruitment and performance evaluation
- Ensuring the organization uses feedback collection tools and closes the feedback loop during each Customer interaction
- Soliciting Customer feedback to iteratively improve Customer Service processes

For both the temporary and permanent position, the Corporate Customer Service Leader must have skills in **transformational leadership** to engage for impact and influence. A transformational leader inspires and motivates through times of organizational change. They possess tenacity, charisma, risk-taking, and ensure that everyone is involved and empowered with a compelling vision and clear plan of action. This coincides with the ability to gain acceptance of the organization's vision and strategic direction. A transformational leader recognizes the importance of understanding stakeholder's needs and motivation to get everyone on board and aligned to organizational goals. These skills are further described in the draft job description (Appendix C).

Cost Analysis

Item	2023	2024	2025	2026
Staff time – recruitment (1)	$9,000			
Temporary Position (2)	$140,000	$140,000	-	
Permanent Position (3)	-	-	$180,000	$180,000
Total Cost	**$149,000**	**$140,000**	**$180,000**	**$180,000**

Notes:

1. Staff time (approximately 200 hours in 2023) includes involvement from the Steering Committee, City Management Team (CMT), Human Resources.
2. Temporary Position is based on feedback from the Finance division.
3. Permanent Position is a budgetary salary based on findings from the external scan.

4.2.2 Core Services

Critical Event Management System (CEMS) Deployment

Background

The Region of Waterloo's Emergency Management Office is responsible for managing the CEMS contract on behalf of the area municipal partners, including the City. The primary use of the CEMS is for Alert Waterloo Region (Alert WR), which provides public safety messages to Customers during emergency situations such as flooding or severe weather events.

CEMS Deployment

In addition to Alert WR's public safety messages, the CEMS is used by City Fire Services to assist in the process of calling in staff to fill vacant shifts. The Platoon Chief uses the CEMS to send a blast notification to a group of firefighters, who can respond within a pre-determined amount of time to either accept or decline the shift. The Platoon Chief then assigns the shift to the respondent who should be awarded the shift. A very similar process could be employed by On-Call Operators.

Currently, On-Call Operators are required to make sequential phone calls to a roster of 10 - 25 call-out staff who can respond to urgent After Hours requests. This process is time consuming and inefficient. The CEMS can be used to improve this call-out process. The vision is that when an On-Call Operator receives a request from the Area Municipality Call Centre that must be operationalized, they use the CEMS to send a blast notification to the correct group of call-out staff. Staff would have a pre-determined window of time to respond if they are available and interested. The On-Call Operator would then contact the call-out staff who are awarded the shift. Once the shift has been filled, a second notification would be sent through the CEMS to notify all call-out staff that the request has been filled.

Utilizing the CEMS in the After Hours call-out process has three main benefits:

- Increased efficiency in filling urgent After Hours requests

- Improved job satisfaction for the On-Call Operator
- Providing an audit trail to confirm staff selection decisions and reduce union grievances

Proposed Approach

The Deputy Chief of Fire Services provided input to define the steps to rapidly adopt the CEMS in the After Hours process:

- Select 2 - 3 administrators responsible for configuring the After Hours template and maintaining the contact list. Configuring the template includes deciding on factors such as standardized messaging and response time. Within Fire Services, one of the Deputy Chiefs is the CEMS administrator. Administrators should complete training from the CEMS vendor, which will be arranged through the Manager of Emergency Management at the Region of Waterloo.
- Once the After Hours template is complete, a procedure should be created outlining the response time and shift selection factors. This procedure can be reviewed with call-out staff.
- A test should be completed to ensure everything has been configured properly.

These implementation steps could be completed in two steps – pilot and full roll-out. A pilot could be undertaken with one of the On-Call Operators to establish a template and related processes. This can then be expanded to the second On-Call Operator.

Cost Analysis

Item	2023	2024	2025	2026
Staff time – setup and training (1)	$4,000			
CEMS training consultant	$2,000			
Total Cost	**$6,000**	-	-	

Notes:

1. Staff time includes involvement from City Utilities and FDMS divisions (On-Call Operators, Call-Out Staff and Supervisors) and Human Resources (estimated at 90 hours total in 2023)

After Hours Intake of Service Requests

Background

The After Hours intake of service requests was identified as a high priority in the centralized Customer Service strategy. There is significant opportunity to improve After Hours Customer Service experience and operational efficiency.

Divisions included in the scope of centralized After Hours Service include:

- City Utilities
- Transportation
- Parks, Forestry, and Cemeteries
- Facility Design and Management Services
- Community Programming and Outreach Services
- Recreation Services, and
- Municipal Enforcement parking complaints.

After Hours service includes calls received during the following time periods:

- Monday to Friday 4:30 PM – 7:00 AM
- 4:30 PM on Friday until 7:00 AM on Monday (weekends)
- 24-hour coverage on Statutory Holidays

Service requests during regular programming hours for Recreation Services and Community Programming and Outreach Services that fall into the After Hours timeframe are out of scope.

Four options were analyzed for a centralized intake strategy for After Hours service requests:

A. Enhanced Area Municipality Call Centre

The Area Municipality Call Centre is the current service provider for After Hours calls for the City. This option includes several enhancements to align with a centralized After Hours Customer Service strategy.

B. External Call Centre

The External Call Centre is a current service provider for internal After Hours support for IMTS. They are an established third-party Canadian call centre working with several large municipalities.

C. 24/7 Service Centre

The City's Service Centre currently operates from 7:00 AM – 4:30 PM on weekdays. This option would see hours of operation extended to 24-hours per day, 7 days a week to address the scope of a centralized After Hours Service.

D. Extended Service Centre + External Call Centre

This option is a hybrid of the City's Service Centre and the External Call Centre.

Assumptions

The following assumptions were used in this analysis:

- The current call volume is approximately 3,200 calls/ year, which on average, can be divided evenly between all months.
  - This includes the current calls handled by the Area Municipality (estimated at 1,600 calls / year) plus Municipal Enforcement parking complaints (estimated at 1,600 calls / year) which would become an integral component of the centralized After Hours Service.
- The average call length is 3 minutes.
- All options are anticipated to:
  - Have similar implementation / setup costs
  - Require accurate and well-maintained scripting, contact information, and process documentation
  - Require a lead or supervisor responsible for managing After Hours performance and driving continuous improvement

Decision Criteria Matrix

A weighted decision-criteria matrix for evaluating these options was finalized with input from the Steering Committee (Table 3).

Table 3. Weighted Decision Criteria Matrix

Decision Criteria	Weighting
Operational Efficiency • Structured process to operate with detailed call scripts • All calls are captured • First call resolution • Call is directed to the correct person	40%
Cost Effectiveness • Cost per call	20%
Ability to Monitor and Control Performance • Call quality review capabilities • Tracking and reporting	30%
Vulnerability • Number of lines • Ability to call-in support staff • Ability to work remotely • Business Continuity Plan	10%
TOTAL	100%

Options Analysis

A. Enhanced Area Municipality Call Centre

Analysis of Option A started with a review of division stakeholder interview feedback from Task 1 and a review of the existing contract with the Area Municipality. Additional interviews were conducted with the Supervisor for the Area Municipality Service Centre.

Today, the Area Municipality responds to After Hours calls for the City on the following schedule:
- Monday to Friday 3:00 PM – 7:00 AM
- 3:00 PM on Friday until 7:00 AM on Monday
- 24-hour coverage on statutory holidays

The Area Municipality responds to urgent requests such as watermain breaks, large branches down on City roads and lighting issues at outdoor Recreation facilities. For non-urgent requests, the Customer Service Rep directs the Customer to call the City the next business day.

To improve effectiveness and achieve a centralized After Hours service, recommended enhancements to the existing contract with the Area Municipality Call Centre include:
- Adjusting the hours of operation to start at 4:30 PM instead of 3:00 PM to remove overlap with the City Service Centre and minimize confusion.
- Adding Municipal Enforcement parking complain calls at no extra cost (double the annual call volume)[9]
- Conducting training with Area Municipality Call Centre staff to ensure adoption of updated call scripts and improved effectiveness in:
    - Directing urgent calls to the correct On-Call Operator
    - Directing non-urgent requests to leverage website content and available digital channels
    - Identifying requests that are covered by other agencies (e.g., City of Kitchener, Region of Waterloo) and re-directing as appropriate
    - Responding to general inquiries

The evaluation results for Option A. Enhanced Area Municipality Call Centre are summarized in Table 4. Although the proposed enhancements to double call volume significantly reduce the average cost per call from $18.75 to $9.50, several concerns remain related to operational efficiency, the ability to monitor and control performance and vulnerability.

First, the Area Municipality Call Centre has abandoned call rates and answer targets that do not align with industry standards. Contributing factors include a lack of voicemail functionality, a single telephone line with a queue (resulting in dropped calls) and only one Customer Service Rep working between 9:00 PM – 7:00 AM. Additionally, the Area Municipality Call Centre does not have a structured process to drive continuous improvement (e.g., call scripts have not been frequently updated since the contract was initiated). Some measures are in place for monitoring and controlling performance, such as informal call quality evaluations which are completed by the Call Centre Supervisor. However, due to CRM limitations, only rudimentary call tracking and reporting can be provided to the City. Finally, due to its geographic proximity to the City, this option provides limited redundancy when major events occur (e.g., 2022 summer windstorm that affected both cities).

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[9] As per Municipal Enforcement's discussion with the Area Municipality on a pilot for After Hours requests

Table 4. Analysis of Enhanced Area Municipality Call Centre

Decision Criteria	Analysis
Operational Efficiency	• 9% abandoned call rate (1), higher than the industry target (4 – 5%) • Current target is 80% of calls answered in 30 seconds, below industry targets (80% of calls answered in 20 seconds) (3) • No voicemail functionality (4) • Limited structure to drive continuous improvement on call scripts
Cost	• Fixed 3-year contract with annual 3% increase • Proposed arrange (inclusive of Municipal Enforcement parking complaints): **$9.50 per call** • Note: Current arrangement estimated at **$18.75 per call**
Ability to Monitor and Control Performance	• Informal call quality evaluations are completed • Minimal performance objective metrics for Area Municipality Reps • Ability to do manual call tracking with simple call labeling
Vulnerability	• Single line in with queue, but no voicemail (4) • Only 1 Customer Service Rep from 9:00 PM – 7:00 AM • Additional Reps can be added remotely if needed

Notes:

1. The percentage calls terminated before they could be responded to by a Customer Service Rep
2. https://www.callcentrehelper.com/measure-call-abandon-rate-75869.htm
3. http://mba.tuck.dartmouth.edu/pages/faculty/robert.shumsky/xtrain_large_cc.pdf
4. Voicemail functionality and adding additional lines may be possible with the upgrade to a new Telephony System in the next 6 – 12 months

B. External Call Centre

An external call centre service ("External Call Centre") is an existing provider of internal After Hours service for the City's IMTS division. They are an established, private sector, Canadian-based call centre with multiple sites in Eastern Canada, servicing a large group of clients across North America including the cities of Waterloo, Halifax, Calgary, and Toronto.

To analyze this option, IMTS and the Director of Sales for the External Call Centre were consulted. The External Call Centre provided documentation outlining commercial references, their recognition with the Canadian Call Management Association, and a budgetary quote based on the After Hours call volume assumptions.

The scope of service would be the same as Option A:
• Coverage of calls from 4:30 PM – 7:00 AM on weekdays and 24-hour coverage on weekends and statutory holidays
• Respond to service requests for all in-scope divisions
• Complete training to ensure proper adoption of call scripts for maximum effectiveness in:

- o Directing urgent calls to the appropriate On-Call Operator
- o Directing non-urgent requests to leverage website content and available digital channels
- o Identifying requests that are covered by other agencies (e.g., City of Kitchener, Region of Waterloo) and re-directing as appropriate
- o Responding to general inquiries

The evaluation results for Option B. External Call Centre are summarized in Table 5. Overall, the External Call Centre has an efficient Telephony System that allows Customer Service Reps to meet industry targets for response times. The IMTS division has confirmed that the External Call Centre is a reliable service and maintains detailed call scripts. Formal call quality measures are in place to provide the City detailed call tracking and statistical reporting. Since the External Call Centre is in a different geographic location, there is additional redundancy to the City's centralized After Hours strategy. For example, if a major power outage occurred across the Region of Waterloo, the External Call Centre would not be affected. In the case of a major event on the East Coast, they have a robust business continuity plan in place to maintain service. The External Call Centre could also serve as a redundant site to the City if a major event occurred during Regular Hours. The pricing for the External Call Centre is based on a monthly minute rate plan with flexibility to move between plans if the After Hours call volume changes. This is the lowest cost option with an estimated cost per call of $4.00.

Table 5. Analysis of the External Call Centre

Decision Criteria	Analysis
Operational Efficiency	• Industry standard telephony system • 80% of calls answered in 20 seconds (industry target) • Proven operational efficiency through existing service with IMTS • Customer Service expertise (pre-existing CRM and scripting knowledge) • Structured processes to operate with detailed call scripts
Cost	• Flexible per minute cost model • **$4.00 per call**
Ability to Monitor and Control Performance	• Call quality measures in place • Detailed call tracking and statistical reporting
Vulnerability	• Robust business continuity plan • Multiple geographic locations outside the City • Multiple phone lines with multiple on-shift agents

C. 24/7 Service Centre

Currently, the Service Centre operates from 7:00 AM – 4:30 PM Monday to Friday. To provide a centralized After Hours customer service strategy, the Service Centre could expand its hours of operation to function 24/7/365. This would require additional part-time reps to cover the extended hours of operation, management on-call compensation, improved utilization of Telephony System capabilities, and consistent call logging through a system of record (e.g., WMS).

Under this option, a 24/7 Service Centre would receive all After Hours requests for the City. Through updated call scripts, Customer Service Reps would need to be trained to:

- Direct urgent calls to the appropriate On-Call Operator
- Direct non-urgent requests to leverage website content and available digital channels
- Identify requests that are covered by other agencies (e.g., City of Kitchener, Region of Waterloo) and re-directing as appropriate
- Respond to general inquiries

The evaluation results for Option C. 24/7 Service Centre are summarized in Table 6. Positive elements of this option include Customer Service Reps having internal business knowledge to support service requests and flexibility to complete additional admin tasks during low call volume periods. Customer Service Reps could also work remotely using the Telephony System VoIP capabilities. Key challenges of this option include a lack of structured processes to operate an After Hours service today and only rudimentary call quality monitoring and reporting capabilities. To staff a 24/7 Service Centre, additional Customer Service Reps would be required as well as an On-Call Supervisor. This is the highest cost option at an estimated cost per call of $42.00.

Table 6. Analysis for 24/7 Service Centre

Decision Criteria	Analysis
Operational Efficiency	- Internal knowledge - New processes required to implement After Hours support (supervision, scheduling, etc.) - Flexibility to complete additional admin tasks - Ability to enter work orders into the WMS and PCS - No structured processes to operate with detailed call scripts
Cost	**$42.00 per call** (1)
Ability to Monitor and Control Performance	- Rudimentary monitoring of call quality - Rudimentary tracking and reporting
Vulnerability	- General City of Waterloo business continuity plan - Ability for reps to work remotely through VoIP technology

Notes:

1. The cost per call includes:
   - The addition of two 8-hour shifts 5 days a week + three 8-hour shifts twice a week
     - Using the compensation rate for part-time Recreation Customer Service staff
   - Administrative Supervisor On-Call compensation

D. Extended Service Centre + External Call Centre

In this option, the Service Centre would expand its hours of operation to 6:00 AM – 7:00 PM Monday – Friday to cover the high-volume periods of After Hours calls. This could be achieved by staggering the

current shifts and adding one additional part-time Customer Service Rep. The External Call Centre would cover After Hours call on the following schedule:

- 7:00 PM – 6:00 AM Monday to Friday
- 7:00 PM on Friday to 6:00 AM on Monday
- 24-hour coverage on statutory holidays

The Service Centre and the External Call Centre would use the same City scripting to:

- Direct urgent calls to the appropriate On-Call Operator
- Direct non-urgent requests to leverage website content and available digital channels
- Identify requests that are covered by other agencies (e.g., City of Kitchener, Region of Waterloo) and re-directing as appropriate
- Respond to general inquiries

The evaluation results for Option D. Extended Service Centre + External Call Centre are summarized in Table 7. This hybrid option aligns the highest After Hours call volume periods with the Service Centre's internal business knowledge. The Service Centre would have flexibility to complete additional admin tasks during quiet periods. Expanding the Service Centre hours of operation would require one additional Customer Service Rep. This option takes advantage of the call quality measures and detailed tracking and reporting capabilities through the External Call Centre. Both the City and the External Call Centre have established business continuity plans, and with different geographical locations, there is additional redundancy. The estimated cost per call is $7.00.

Table 7. Analysis of Extended Service Centre + External Call Centre

Decision Criteria	Analysis
Operational Efficiency	- Internal knowledge matched to high call volume periods - Flexibility for Service Centre staff to complete additional admin tasks - Uses the External Call Centre's structured processes for creating and operating with detailed call scripts
Cost	**$7.00 per call** (1)
Ability to Monitor and Control Performance	- Hybrid - Service Centre – rudimentary call quality measures, tracking and reporting - External Call Centre – industry standard call quality measures, detailed tracking and reporting
Vulnerability	- General City of Waterloo business continuity plan, External Call Centre service specific business continuity plan - Enhanced redundancy for the City through the External Call Centre (different geographical location)

Notes:

1. The cost per call includes:
   - The addition of 1 part-time Customer Service Rep at the Service Centre
     - Using the compensation rate for part-time Recreation Customer Service staff
   - Monthly External Call Centre plan based on current call volume between 7:00 PM – 6:00 during the week, and 24-hour coverage on weekends and statutory holidays

Critical Success Factors

Critical success factors to consider in moving forward with a new option to support a centralized After Hours service strategy include:

- **Creating and maintaining detailed call scripts and process documentation**. Division Supervisors and Managers provided feedback on the four options during a virtual workshop on October 4, 2022. Local knowledge was perceived as an important factor in accurately responding to service requests. A key example provided was deep knowledge of the services delivered by the City versus the Region of Waterloo in the two-tiered municipal structure.

  Whether the External Call Centre service requests are received by the Area Municipality, the City Service Centre, or the External Call Centre, Customer Service Reps must be trained in service delineation between the two tiers. It cannot be assumed that any Customer Service Rep will begin this role with "deep knowledge" in service delineation between the two tiers. It is the City's responsibility to train all After Hours Customer Service Reps and ensure they have the necessary resources to respond to service requests correctly and efficiently. Therefore, the creation and maintenance of detailed call scripts and process documentation is a critical success factor that will influence the operational efficiency of all options.

- **Adoption of recommendations to the FDMS After Hours process**. Prior to the analysis of the After Hours options, a review was completed on the After Hours calls for the Facility Design & Management (FDMS) division. Data from this analysis informed three recommendations for FDMS:
  - Adopt Transportation and City Utilities' sick-call-in process to reduce staffing related calls.
  - Add FDMS shift coverage from 6 AM – 11 PM to reduce overtime costs and relieve current workload pressure.
  - Complete a detailed alarm analysis to improve the response to certain alarm types.

  Implementing these recommendations will remove inefficiencies in the current After Hours process and reduce overall call volume.

Decision Matrix Results

All four options for After Hours intake of service requests were scored using a decision matrix with the pre-determined weighted decision criteria. For each criterion, options were scored on a rating scale of 1 to 5, with 1 being poor/low and 5 being strong/high. Figure 13 shows the completed decision matrix.

Figure 13. Completed Decision Matrix

Criteria	Weight	Enhanced Area Municipality		External Call Centre		Extended Service Centre		Extended Service Centre + External Call Centre	
		Score	Wgt Score	Score	Wgt Score	Score	Wgt Score	Score	Wgt Score
Operational Efficiency - Structured process to operate with detailed call scripts - All calls are captured - First call resolution - Call is directed to the correct person	40	2	80	5	200	3	120	5	200
Cost Effectiveness - Cost per call	20	3	60	5	100	1	20	4	80
Ability to Monitor and Control Performance - Call quality review capabilities - Tracking and reporting	30	2	60	5	150	3	90	4	120
Vulnerability - Number of lines - Ability to call-in support staff - Ability to work remotely - Business Continuity Plan	10	2	20	5	50	4	40	5	50
Total	100	9	220	20	500	11	270	18	450

For operational efficiency, the External Call Centre (Option B) scored a 5 considering their structured processes to operate with detailed call scripts and their industry standard telephony system, both of which allow them to capture all calls, achieve first call resolution, and accurately respond to the Customer. The Extended Service Centre + External Call Centre (Option D) also scored a 5, due to the combined use of internal knowledge of the City Service Centre and the External Call Centre processes and technologies. A 24/7 Service Centre (Option C) scored a 3 for the internal knowledge of the City Service Centre and the ability to enter work order data into existing systems, while considering the lack of current After Hours processes to operate with detailed call scripts. An Enhanced Area Municipality Call Center (Option A) scored a 2 because of an inability to meet industry targets and a lack of structured processes to drive continuous improvement.

For cost effectiveness, the External Call Centre (Option B) scored the highest with a cost per call price of $4.00. This is followed by the extended Service Centre + External Call Centre (Option D), the Enhanced Area Municipality Call Centre (Option A), and 24/7 Service Centre (Option C), with respective cost per calls of $7.00, $9.50, and $42.00.

For the ability to monitor and control performance, the External Call Centre (Option B) scored the highest due to their call quality measures and detailed tracking and statistical reporting. The data

collected by the External Call Centre is available to the City for analysis and to inform continuous improvement measures. The extended Service Centre + External Call Centre (Option D) scored a 4 due to the combined use of rudimentary tracking at the Service Centre and detailed tracking and reporting through the External Call Centre. A 24/7 City Service Centre (Option C) scored a 3, considering the current rudimentary monitoring of call quality and completion of tracking and reporting. The Enhanced Area Municipality Call Centre (Option A) scored a 2, in light of their informal call quality evaluations and ability to perform manual call tracking with simple call labeling.

For vulnerability, the External Call Centre (Option B) and the Extended Service Centre + External Call Centre (Option D) both scored a 5. The External Call Centre provides enhanced redundancy for the City by being in a different geographical location. As well, the External Call Centre has multiple phone lines with multiple on-shift agents, and the Service Centre has the ability for Customer Service Reps to work remotely. Both organizations have a business continuity plan in place. A 24/7 Service Centre (Option C) scored a 4, due to the City's business continuity plan and the ability for Customer Service Reps to work remotely. The Enhanced Area Municipality Call Centre (Option A) scored a 2. Although additional Reps can be added remotely if needed during major events, as a limitation of the current system, there is only a single line in with queue but no voicemail. This results in calls getting dropped during major events with high call volume.

Overall, the External Call Centre scored the highest in terms of operational efficiency, cost effectiveness, ability to monitor and control performance, and vulnerability.

Proposed Approach

Proceeding with the External Call Centre (in accordance with the City's Purchasing Bylaw) was recommended to and confirmed by the Steering Committee and used as the basis for the cost analysis. The transfer to the External Call Centre can be implemented in 2023. The first step for implementation is to create detailed call scripts. The External Call Centre's call script writer would work with the City to create call scripts and process documents to support a centralized After Hours service strategy.

Cost Analysis

The cost analysis is based on the preferred Option B – External Call Centre.

Item	2023	2024	2025	2026
COSTS				
Staff time (1)	$15,000	$3,000	$3,000	$3,000
External Call Centre (2)	$17,000	$12,000	$12,000	$12,000
Total Cost	**$32,000**	**$15,000**	**$15,000**	**$15,000**
SAVINGS				
Area Municipality Contract	($30,000)	($30,000)	($30,000)	($30,000)
Increased efficiency - **On**-Call Operators	-	($52,000)	($52,000)	($52,000)
Total Savings	**($30,000)**	**($82,000)**	**($82,000)**	**($82,000)**

Notes:

1. Staff time is required to develop call scripts, update the existing External Call Centre contract, create Telephony System programming changes, and lead organizational change management (estimated at 350 hours in 2023). The Service Centre Supervisor includes an annual review of the call scripts and regular oversight of the After Hours service (approximately 72 hours annually).
2. The External Call Centre Service costs is based on their pricing plans as of September 2022. In year one, a $5,000 setup fee has also been included.

List of Services

Background

A List of Services details what services are available to Customers and how they can be accessed. During Task 1 workshops, division stakeholders shared that Customers occasionally get routed to the incorrect division, resulting in longer call resolution times and Customer frustrations. Staff requested higher proficiency in responding to Customers and directing them to the correct information. A List of Services would meet this need, by equipping staff and City Council to direct service requests to the appropriate division or channel and providing sufficient information about all the external services offered at the City. At a time when new Council members for the City and the Region have just been elected, the List of Services would be particularly useful for new Councilors who must respond to or redirect Customer calls. A List of Services creates alignment on terminology, highlights process duplications, and clarifies roles and responsibilities.

A List of Services becomes a foundational piece for:

- Onboarding staff and Councillors
- Demonstrating the value of the City's services
- Allowing staff to operate cross-functionally
- Informing the information provided on the City website and the digital intake of service requests
- Clarifying the two-tier structure of the City and the Region of Waterloo

List of Services Template

An Internal List of Services template (Table 8) was created with input from division Supervisors and Managers. Presented below is an example for the service Loose Leaf Collection.

Table 8. List of Services Template (Internal Resource)

List of Services	Template Example
Service Name	Loose Leaf Collection
Key Words	Leaves, leaf, schedule, loose leaf collection
Short Description	From the end of October to November, a pick-up schedule and area signage are posted to inform residents when their leaf collection will be. This program is intended for City trees only. Leaves must be raked out to the curb in a pile. [Link to related images]
Online Information	waterloo.ca/leaves
Digital Service Request	N/A
Service Request Managed by	Waterloo Service Centre Admin **Phone: 519-886-2310** Hours of Operation: 7:00 AM – 4:30 PM, Monday – Friday
Delivered by	Transportation Email: roads@waterloo.ca [Link to escalation process for Transportation]
Service Delivery	Regular Hours: 7:00 AM – 3:00 PM Monday to Friday After Hours: No After Hours service delivery
Call Script	[Link to related call script]
See Also	Bagged leaves / Yard Waste – Region of Waterloo [link to website and phone number]
Version History	Edited by: [name, position, date] Content Approved by: [name, position, date] Communications Review: [name, position, date]

Within the "Delivered by" field, there is a line that links to the escalation process for the related division. Escalations occur when there is a question a Customer Service Rep cannot resolve, or the Customer is not satisfied with the interaction. If not handled effectively, these scenarios can escalate further and potentially lead to reputational damage.

An escalation process should identify:

- When a call should be escalated
- Who a call should be escalated to
- Response time expectation and next steps for the Customer

Implementation Requirements

There are 6 requirements to implement a List of Services:

1) **Content Development.** A template for each service must be completed with direct alignment to the call scripts and the website.
2) **Quality Assurance.** Templates must be reviewed for consistency and adherence to document regulations.
3) **Digital Integration.** The List of Services should be published on an internal portal. This will involve support and guidance from the IMTS division.
4) **Maintenance Process.** The roles and responsibilities for keeping the List of Services up to date must be clearly defined.
5) **Approval Process.** An automated process for approving new/updated services must be defined.
6) **Continuous Improvement.** Continuous improvement measures must be established, including frequency of review.

These implementation requirements have been included in a proposed two-step approach for adopting an internal List of Services at the City.

Step 1 focuses on content development for the most requested services, while developing processes for quality assurance, digital integration, and approval. This step can be led by an interim Project Manager or the Corporate Customer Service Leader, depending on the start-date of the Corporate Customer Service Leader. The City could consider hiring co-op students to facilitate the content development and quality assurance requirements.

Step 2 addressed the remaining services not covered under Step 1. As proposed for Step 1, this can be facilitated by a co-op student. In addition to the continuation of the processes that were created in Step 1, a maintenance process will be developed. This step can be led by the Corporate Customer Service Leader, who will also drive continuous improvement.

Cost Analysis

Item	2023	2024	2025	2026
Staff time (1)	$25,000			
Annual Maintenance (2)		$4,000	$4,000	$4,000
Co-op Student for Project (3)	$45,000	$15,000		
Total Cost	**$70,000**	**$19,000**	**$4,000**	**$4,000**

Notes:

1. Staff time includes involvement from the Supervisor of the Service Centre, division Subject Matter Experts, division Supervisors, IMTS, and Corporate Communications. Tasks include coordination of service list development, template creation, quality assurance, Telephony System programming, and documentation (approximately 570 hours in total for 2023).
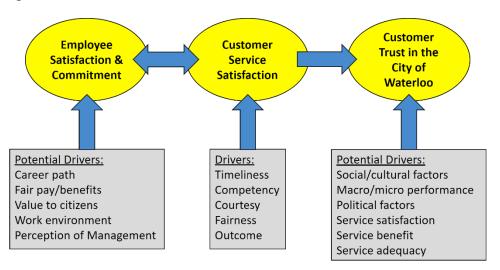
2. Annual Maintenance includes a review of all services annually by the Supervisor of the Service Centre (estimated at 90 hours over 2024, 2025, and 2026).
3. A Co-op Student will be responsible for interviewing all necessary staff and ensuring consistency in service template completion. A minimum of three 4-month work terms is expected, but four terms have been included for cost analysis ($15,000/term).

Service Channel Best Practices

Background

The public sector service value chain, adopted by the Canadian federal government[10] demonstrates the connection between employee satisfaction, Customer satisfaction, and Customer trust (Figure 14). Employee satisfaction drives Customer Service satisfaction, which results in Customer trust in the City.

Figure 14. The Public Sector Service Value Chain

To achieve Customer satisfaction, both internal staff and Customers need to understand the City's Customer Service expectations. This is accomplished through:

- Published service standards
- Standardized messaging across the organization
- Training for Supervisors/Managers and Customer Service Representatives
- Regular quality checks
- The correct tools and processes for internal and external users

These items all influence the value chain and relate to service channel best practices.

During Task 1 interviews, division stakeholders shared Customer Service processes that could negatively impact the value chain, including auto-attendants that are confusing and inaccurate, a lack of City-wide phone or email standards or policies, voicemail greetings that are not changed frequently, general inquiries that get lost in individual inboxes when staff are out of office, and silos that make cross-

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[10] Treasury Board of Canada, October 2007, *Citizen-Centred Service Measurement in Canada: From Research to Results,* https://www.oecd.org/gov/budgeting/39761644.pdf

departmental communication difficult. Adhering to service channel best practices will address these current gaps and ensure consistent Customer Service satisfaction and trust.

Best Practices

Phone Channel Best Practices

During a Service Channel Best Practices workshop on October 12, 2022, with division Managers/Supervisors and the Steering Committee, phone channel best practices were shared relating to phone standards, automated call routing, voicemail, and the related roles and responsibilities. These are all areas that can be met with the current resource levels.

Phone standards outline items such as response times, voicemail messaging criteria, and Customer interaction guidelines. Phone standards should be standardized throughout the entire organization and visible to both internal and external Customers.

Automated call routing includes auto attendants and hunt groups, two components of the Telephony System that streamline the call management process and allow call routing to be accomplished without a live operator. Auto attendants can also act as a proactive Customer Service tool to provide relevant, upfront messaging to Customers. Auto attendants also allow for a single point of entry into the phone system, which compliments best practices of minimizing the amount of different phone numbers available to Customers. Automated call routing features should use a standardized script, include short and relevant menu options with the most important options first, sound professional and friendly, be updated frequently, and always provide a way for the Customer to speak to a live agent.

Voicemails should also include a standardized message script that can be updated frequently. Voicemail messages should clearly state the employee's name and division, tell the caller what information to leave in their message, and provide alternate contact information for urgent calls while out of office. Roles and responsibilities for the phone channel should be divided between the IMTS group and by division. IMTS should be responsible for the technical configuration of auto attendants and phone lines and the initial setup of employees in the system. Division Supervisors/Managers and other staff members should be responsible for the ongoing maintenance of their phone channels, including updating upfront and on-hold messaging and queue management.

Email & Social Media Best Practices

During the Service Channel Best Practices workshop, email and social media best practices were shared relating to email standards, basic email etiquette, individual work emails, corporate email boxes, and social media guidelines. These are all areas that can be met with the current resource levels.

Email standards outline items such as acknowledgement of receipt, response times, and out of office policies. Email standards should be aligned throughout the entire organization and be visible to both internal and external Customers.

Basic email etiquette includes the steps that are taken within each email to maintain accurate and professional communication. Some email etiquette items include taking extra care with attachments, being careful when sharing sensitive information, and proofreading for emotional tone and word choice to avoid misinterpretation.

Individual emails are directed to a specific staff member (example: firstname.lastname@waterloo.ca). Individual emails should always include a standardized email signature with up-to-date contact information, adhere to corporate email standard etiquette and policies, be used only for corporate purposes, and consistently utilize standardized out of office emails.

Shared email boxes are managed by multiple staff members and are different from email groups. Shared emails should also include an automated response to the Customer saying that their email has been received and outlining when they can expect a response. Shared emails should also have a clear schedule of primary and secondary leads for each inbox, include tracking and reporting capabilities, and have the ability to update messaging for extenuating circumstances (I.e., increased volume due to a major event).

For City social media accounts, there should be clear roles and responsibilities to outline who posts comments to avoid the risk of an unmonitored viral community response. Typically, social media is best used for outbound information instead of inbound requests. Nevertheless, there will be Customers who wish to submit service requests through social media platforms. Because of this, the hours that each social media account is monitored must be clearly stated to avoid missing urgent requests After Hours.

Current Adherence to Best Practices

During the Service Channel Best Practices Workshop, participants had the opportunity to evaluate how their division's service channel usage adhered to best practices, in terms of Customer Service Process Maturity. Based on the survey results (24 respondents), all service channel components have a process maturity near a **Level 2 – Developing**. This means that the adherence to service channel best practices is generally accepted, but not documented or consistently followed. Staff have a clear desire to provide well-defined Customer Service, but require the supporting tools, processes, and leadership.

Implementation of Service Channel Best Practices

A three-step approach is proposed for implementing service channel best practices. Step 1, which can be targeted for 2023, will be led by either an interim project manager or the Corporate Customer Service Leader, depending on the start date of the Customer Service Leader. Step 1 includes:

- Establishing interim oversight and plans
- Creating basic corporate standards for email and phone
- Distributing templates
- Completing a review of external phone numbers
- Reviewing roles and responsibilities between IMTS and operational areas
- Review Telephony System utilization

Step 2 can then be led by the Corporate Customer Service Leader within 2024. Step 2 includes:

- Establishing an implementation plan
- Developing Service Level Agreements (SLAs)
- Developing Customer Service KPIs
- Streamlining external phone numbers
- Training Supervisors and Managers

Step 3 will also be led by the Corporate Customer Service Leader and will occur within 2025. Step 3 includes:

- Monitoring and measuring SLAs / KPIs
- Driving continuous improvement
- Ensuring the expanded use or service channel best practices which are integrated into all City processes

Potential Barriers

During the Service Channel Best Practices workshop, division Supervisors/Managers identified potential barriers to implementing service channel best practices. These included:

- All channels
  - Undefined Corporate Customer Service Strategy
- Phone Channel
  - Current auto attendant is complex and inefficient
  - Daily voicemail updates are cumbersome
  - Too many external phone numbers (40+ numbers listed on the City website)
  - Reliance on IMTS to update auto attendant greetings
  - Reliance on one employee's voice for auto-attendant updates
  - Landlines and cell phones require duplication of updates
- Email & Social Media Channels
  - Creating a culture of a "responsive workplace"
  - Tracking and monitoring standards
  - Quality checks may affect morale
  - No process to redirect/disseminate emails from Councillors to divisions
  - Insufficient resources to address complaints
  - No training processes

Cost Analysis

Item	2023	2024	2025	2026
Staff time				
Email & Voicemail (1)	$8,000			
Reduce External Phone Numbers (2)	$2,000	$13,000		
Auto-Attendant/ **T**elephony Utilization (3)	$4,000	$13,000		
External Customer Service Consultant	$30,000	$30,000		
External Telephony System Consulting	$10,000	$10,000		
Total Cost	**$54,000**	**$66,000**		

Notes:

1. Includes communication of strategy with CMT, supervisors and staff; email templates, voicemail protocol, responsibility matrix by division (approximately 175 hours in 2023).
2. Includes completing an external phone number analysis (estimated at 35 hours in 2023) and implementing changes (estimated at 300 hours in 2024).
3. Includes defining changes (estimated at 100 hours in 2023) and implementing changes (estimated at 300 hours in 2024).

4.2.3 Process Improvement

Digital Intake of Service Requests

Background

Over the past decade, the largest advancements for increased effectiveness in public sector Customer Service has been the expansion of digital channels. Transformative digital strategies are being successfully executed across Canada by the federal government[11], provincial government[12] and many municipal governments. For high volume and easy-to-deliver services, the digital channel can be utilized at a fraction of the cost of in-person, phone, or email channels. Based on Existing State Findings, qualitative estimates indicate that the digital channel represents less than 5% of all service requests at the City of Waterloo today. An accelerated plan to increase the utilization of the digital channel will position the City to better align with Customer expectations and the broader public sector and realize a significant opportunity for increased effectiveness and cost savings.

During Task 1 division interviews, staff shared that previous attempts to increase the use of the customer service digital channels raised concerns from Council. The COVID pandemic has significantly narrowed the digital divide in the community which should alleviate concerns that the Customers would not accept digital services. Similarly, online transactions are now a minimum service level expectation for Customers.

Challenges

The potential for increased effectiveness through the digital intake of service requests is significant, but there are some key challenges that must be considered.

The first challenge is starting with a well-defined list of services from which to identify the high volume, easy-to-deliver services. Many services can be automated using the digital channel. For the services that are well suited for the digital channel, there must be a sufficient level of detail to identify the "low hanging fruit" and prioritize development efforts.

The second challenge is ensuring that the digital intake strategy provides the necessary data to support future Customer Service performance measures that have been identified as an implementation priority for the Corporate Customer Service Leader.

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[11] "Canada's Digital Strategy, Roadmap for a more Digital Government", Government of Canada, https://www.canada.ca/en/government/system/digital-government/digital-government-strategy/roadmap.html.
[12] "Building a Digital Ontario", Province of Ontario, https://www.ontario.ca/page/building-digital-ontario.

Organizational change must also be carefully considered. For divisions utilizing existing work order systems for Customer Service delivery, the digital intake strategy should minimize change to these systems and service delivery processes. For divisions that have no back-office system to manage work orders or service delivery, change will be required to assign and track the fulfillment of digital service requests.

A key objective of this project is to focus on effective utilization of existing technology to address gaps in customer service intake. This required validation of the technical feasibility of integrating multiple applications.

Finally, City staff desire a complete picture of all Customer interactions. This may include property taxes, water invoices, recreational services for which a Customer has registered, and of course service requests. Achieving this objective will require a Customer Relationship Management (CRM) solution. This is the final goal, but there are several prerequisite steps that must be defined that are further outlined in this section.

Evaluation

A **Kickoff Workshop** for the Digital Intake of Service Requests alternative was conducted with the Steering Committee. The team explained the objective of evaluating options for digital intake to achieve consistency in customer service experience and data quality across all divisions. Two high-level options were introduced:

- Option A – Existing Applications. A high-level process flow diagram of how to leverage existing applications to support digital intake was presented. Follow-up steps were introduced, which included gathering input from Corporate Communications and IMTS and confirming the technical feasibility of required integration.

- Option B – New CRM. This is an approach selected by many municipalities. Follow-up steps included completing an environmental scan of similar size Ontario municipalities that have procured a CRM application in the past five years.

Next, an **Interactive Workshop** with ITMS and Corporate Communications was conducted. A high-level concept of Option A – Existing Applications was introduced, along with several examples of digital intake of municipal services to stimulate discussion and idea generation. Feedback from this workshop helped refine Option A, including:

- Customers expect a tracking number and transparency on the status of digital service requests.
- SMS (used by IMTS for work management) could be considered for divisions that do not have a work order application today.
- Councillors would benefit from a dashboard that reports service requests by ward (e.g., GIS-based dashboard).

Several follow-up meetings were conducted with IMTS subject matter experts to validate the technical feasibility of integration requirements for Option A (integration of existing WMS, PCS, SMS, GIS and Business Intelligence). Finally, the research for Option B – New CRM was completed.

Findings

Option A – Existing Applications

Leveraging existing applications to support the Digital Intake of Service Requests is a technically viable, low-cost option that will allow the City to rapidly increase the effectiveness of the digital service channel. This approach minimizes the overall organizational change required to Back Office processes.

Key elements of Option A include:

- New Service Request Web Pages must be designed and developed for digital intake. There are multiple form builder options that should be further evaluated for user experience, cost of development, maintainability, and ease of integration.

- The Request Type will determine where each service request is routed for fulfilment in the Back Office. Integration will be required with Back Office Systems including:

  - PCS – utilized by Municipal Enforcement, Building Standards and Finance
  - WMS – utilized by City Utilities, FDMS, Parks, Forestry & Cemetery, Transportation
  - SMS – proposed for any divisions without an existing work order application. Note: Divisions adopting SMS must first implement their work processes before the integration of digital service requests can be completed.

- An Email confirmation to the Requester with a tracking number can be configured in all the impacted Back Office applications.

- A Service Request Database, similar to IMTS databases already in use to consolidate Back Office data for reporting in GIS, will be required. This is anticipated to require service request summary data, along with status updates and resolution details.

- A Service Request Inquiry Portal is required that provides a self-service option for Customers to check on the status of a service request. This could utilize a design similar to the IMTS Phone Number Portal, a mobile-friendly portal.

- A Service Request by Ward dashboard, similar to existing GIS pages designed by Ward will be required.

- A new Customer Service KPIs dashboard, linked to the Service Request Database, will be required that supports the Customer Service Leader in introducing digital channel key performance indicators (KPIs).

Based on discussions with IMTS and comparison to enterprise integration projects of similar scale and complexity, the budgetary cost for Option A – Existing Application is substantially less than a new CRM. The timeline to fully implement is 1 – 2 years.

Option B – New CRM

In Option B, a new CRM application becomes the hub for both Front Office and Back Office business processes. Several of the same elements for Option B must also be completed to implement a new CRM:

- New Service Request Web Pages must be designed and developed for digital intake
- CRM integration with Back Office Systems with the PCS, WMS and SMS

However, most CRM applications should provide the follow capabilities out-of-the-box:

- Customer Portal inclusive of self-service ability to check on the status of a service request
- A Service Request by Ward dashboard
- Customer Service KPIs dashboard

Finally, a new CRM should provide the foundational necessary to achieve the City's broader objective of a complete picture of all a Customer's interactions.

Key findings from the external scan of similar size municipalities that have procured a CRM application in the past 5 years include:

- Microsoft Dynamics CRM was selected by 7 of 8 municipalities reviewed (Region of Peel, Vaughn, Brampton, Timmins, Guelph, Burlington, Chatham-Kent).
- The Association of Municipalities of Ontario (AMO) conducted a formal RFP process in 2018 – 2019 to select a digital customer service platform for its membership. AMO partnered with Frequency Foundry, a Microsoft Dynamics CRM partner, who offers an integrated module called Signal to help municipalities manage and track requests, complaints, and inquiries.

Based on this external scan, the typical timeline to fully implement a new CRM is 2 – 4 years.

Summary

Overall, both options are feasible to support the Digital Intake of Service Request alternative. However, a phased two-step approach offers the best opportunity to align with this project's objectives and support the City in achieving their broader objective of a complete picture of all a Customer's interactions. Within the implementation of this alternative, there is an opportunity to align with the Digital Strategy project in Corporate Communications. Further conversation with Corporate Communications is required to identify areas of alignment between the two projects.

Step 1. Existing Applications.

Starting the digital intake of service requests using existing applications aligns with the project's objective of effective utilization of existing technology. This will also minimize organizational change and help secure buy-in from front line staff.

The shorter timeframe to implement means the City can rapidly start to realize the impact of increased effectiveness in customer service intake.

There are two critical success factors for Step 1.

- Success will be tied to staff buy-in, not the "best" technological solution. The savings realized from increased effectiveness in customer service intake can later be used to help fund Step 2 and evolve to the "best" technological solution.
- Digital services must be marketed to Customers. The City will not achieve the desired increase in effectiveness with a "build it and they will come" assumption. Lessons learned from around the world indicate that a highly effective corporate communications plan must be executed, or residents will not even know that the City is ready to shift them to the digital channel.

Step 2. New CRM

Following up with the procurement and implementation of a new CRM system will allow the City to leverage the savings from Step 1 to drive Step 2. Key areas of re-use include service request web pages and know-how for integration with Back Office applications.

Cost Analysis

The cost analysis is based completion of Step 1 to leverage existing applications.

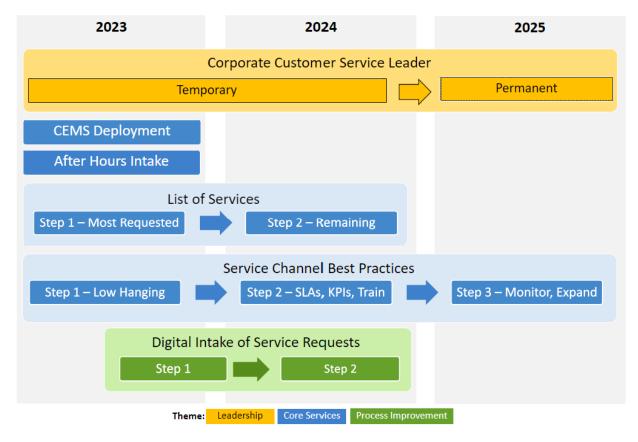| Item	2023	2024	2025	2026
COSTS				
Staff time (1)	$48,000	$60,000	$35,000	$35,000
External Project Manager (2)	$38,000	-	-	-
External Integration Consulting (3)	$36,000	$59,000	-	-
SMS Subscription (4)	-	$13,000	$13,000	$13,000
Total Cost	**$122,000**	**$132,000**	**$48,000**	**$48,000**
SAVINGS				
Efficiency Gains via digital channel (5)	-	($620,000)	($1,200,000)	($1,650,000)

Notes:

1. Staff time includes Corporate Communications, IMTS, division Subject Matter Experts and Supervisor, Service Centre. Year 1 covers new form development and WMS integration (estimated at 1,100 hours in 2023). Year 2 covers PCS integration, SMS deployment to new divisions and SMS forms (estimated at1,375 hours in 2024). Year 3 and 4 are focused on continuous improvement (estimated at 800 hours over 2025 and 2026).
2. External Project Manager is assigned for one day per week for 12 months.
3. External integration consulting is identified for WMS (approximately 100 hours in 2023) and PCS (approximately 100 hours in 2024).
4. SMS will require an additional 25 licenses for divisions without a work management application today. Estimated at $520 per user/year.
5. Efficiency gains are based on the following assumptions:
   - Current digital channel transaction volume is 5%.
   - Target digital channel transaction volume

- o 2023 – no change, one year required to implement and create Customer awareness of digital channel capabilities
- o 2024 – 20%
- o 2025 – 35%
- o 2026 – 45%
- Comparable channel cost per transaction: In-Person $20, Phone/Email $8, Digital $0.50
- Current direct cost of customer service delivery: $4.52M

5. Recommendations

5.1 Implementation Plan

Guided by the Steering Committee, all six alternatives were included in the final cost analysis to understand the financial impact on the current Customer Service Intake arrangement. A phased implementation approach with consideration for dependencies between alternatives was developed (Figure 15). Internal staff capacity and organizational change management was used as the basis for cost analysis.

Figure 15. Phased Implementation Approach of Alternatives

Key assumptions in the phased implementation approach include:

- Corporate Customer Service Leader – Early in 2023 a Temporary leader is assigned. In 2025, a Permanent leader is assigned.
- CEMS Deployment – Start early in 2023 (After Hours priority)
- After Hours Intake of Service Requests (transition to the External Call Centre) – Start early in 2023 (After Hours priority)
- List of Services
  - Step 1 (2023) includes publishing the most requested services and those required for Digital Intake of WMS-related service requests.
  - Step 2 (2024) includes publishing the remaining services.

- o   Success is tied to having the Corporate Customer Service Leader in place.
- Digital Intake of Service Requests
  - o   2023 mid-year implement WMS-related service request web pages and integration (dependent on List of Services, Step 1)
  - o   2024 – implement PCS-related service request web pages and integration; deploy SMS to divisions without a work management solution and implement related forms in SMS.
  - o   Success is tied to having the Corporate Customer Service Leader in place.
- Service Channel Best Practices
  - o   2023 – Achieve most easily attainable goals to improve phone, email and social media practices
  - o   2024 – Establish Customer Service standards, division Service Level Agreements and related training
  - o   2025 –Monitor post-implementation progress and identify areas for continuous improvement

5.2 Cost Impact

Overall, the City has an opportunity to gain $2.5M in staff time from 2023 – 2026 (Table 9). This is primarily driven by cost avoidance from reduced staff time required to manually process Customer Service requests and increased utilization of the digital service channel. The target utilization of the digital channel is 45% of all service requests by 2026 (Figure 16).

Table 9. Net Impact of Alternatives on Customer Service Intake Costs by Year

Item	2023	2024	2025	2026	TOTAL
SAVINGS					
After Hours Intake (Cost Savings)	($30,000)	($82,000)	($82,000)	($82,000)	($276,000)
Digital Intake (Cost Avoidance)	-	($620,000)	($1,200,000)	($1,650,000)	($3,470,000)
Total Savings	**($30,000)**	**($702,000)**	**($1,282,000)**	**($1,732,000)**	**($3,746,000)**
TOTAL COST					
Leadership					
Customer Service Leader	$149,000	$140,000	$180,000	$180,000	$649,000
Core Services					
CEMS Deployment	$6,000				$6,000
After Hours Intake	$32,000	$15,000	$15,000	$15,000	$77,000
List of Services	$70,000	$19,000	$4,000	$4,000	$97,000
Service Channel Best Practices	$54,000	$66,000			$120,000
Process Improvement					
Digital Intake	$122,000	$132,000	$48,000	$48,000	$350,000
Total Costs	**$433,000**	**$372,000**	**$247,000**	**$247,000**	**$1,299,000**
Net Impact	**($403,000)**	**$330,000**	**$1,035,000**	**$1,485,000**	**$2,447,000**

5.3 Organizational Change Considerations

A strong commitment to organizational change management will be essential for a successful implementation of the recommended Customer Service Intake solution. The change management process should include:

- **Planning for change.** This includes communicating roles and responsibilities, addressing resistance to change, prioritizing competing division interests, developing metrics for success, and effectively communicating the vision and value of Customer Service initiatives across the organization.
- **Managing change.** The intent is to take a proactive approach to managing change and let staff know early what change is expected.
- **Monitoring change.** This involves executing a transition strategy to manage and control the effects of change throughout the ongoing implementation of Customer Service initiatives.

Specific organizational change considerations include Corporate Management Team and Council commitment, cultural change, and operational change. These considerations are explained below.

Corporate Management Team and Council Commitment

For a successful adoption of the Customer Service Intake solution, the leadership and visible commitment of resources from the Corporate Management Team and Council will be essential. Ongoing, visible, support from the Corporate Management Team during the implementation of the recommended solution is needed to align the organization, break down silos, and achieve a consistent Customer experience across all divisions.

Cultural Change

To create a consistent Customer Service experience, cultural change across the City will be required to present one Customer Service voice that permeates all of the City's communications, interactions, and service delivery. Current Customer Services processes and technology are utilized inconsistently between divisions, and do not fully support Customers' increased digital expectations and the rapid population growth of the City (Figure 17). Focusing on the culture change needed to achieve consistent processes, technology utilization, messaging, and service expectations will be essential to success of the recommended solution.
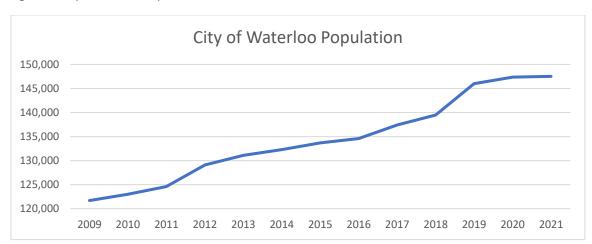
Figure 17. City of Waterloo Population Growth 2009 - 2021

Operational Change

Managing operational change will be critical to realize the benefits of the recommended solution and progress to a higher level of business process maturity for Customer Service Intake. The recommended solution introduces changes to organizational structure, roles, responsibilities, business processes and supporting technology. In particular, commitment to the proposed digital intake of service requests will provide the foundation for efficiency gains and long-term Customer Service Intake improvements.

5.4 Critical Success Factors

To ensure success in the implementation of the recommended solution, it will be crucial to have sufficient internal resource availability and a clear communications plan.

Internal Resource Availability

Division supervisors and managers across the City consistently communicated that staff are at capacity. For a successful implementation, the availability of sufficient financial and staff resources is a fundamental requirement. The backfilling of staff positions and/or additional support will be needed for an effective and fully engaged Corporate Customer Service Leader, division supervisors and managers (including IMTS, Corporate Communications, and the Service Centre), and Customer Service Reps. If financial resources are constrained, the implementation plan should be adjusted to focus on elements of the recommended solution that can be properly resourced and will contributed to increased efficiency.

Collaboration with the Indigenous Initiatives, Accessibility, Anti-Racism, and Equity (IIARAE) team is recommended to ensure that all solutions are free of barriers to Customer Service. The availability of the IIARAE team will therefore be essential for a successful and equitable implementation.

Communications Plan

A comprehensive communications plan is recommended to ensure all stakeholders are well-informed throughout the implementation process and that the short-term and long-term goals are clearly understood. The communications plan should be inclusive of staff, the Corporate Management Team, Council, impacted service providers, and Customers.

Staff are enthusiastic and committed to achieving service excellence. A well-executed communications plan will be essential to ensure continued engagement of staff, and should include a feedback mechanism to monitor this engagement throughout the implementation.

6. Revision History

Rev	Date	Issued For	Prepared by	Checked by	Comments
1	December 15, 2022	Review	E. Martin S. MacGillivray	D. Bruyere R. Parker D. Fletcher	New document
2	January 3, 2023	Review	E. Martin	S. MacGillivray D. Bruyere R. Parker D. Fletcher	
3	January 16, 2023	Final	A. Martel	S. MacGillivray E. Martin	
4					
5					

APPENDICES

Appendix A. Inventory of Existing Services by Division

Economic Development – External Services

- Request for business support
- Land inquiries
- Grant inquiries
- Film permit inquiries
- City festivals and events inquiries
- Murals and temporary public art process inquiries
- Community Improvement Plan (CIP) inquiries
- Business directory inquiries
- Issues with parking pay and display
- City owned parking lot inquiries
- Parking permit inquiries
- Sidewalk patio inquiries

Indigenous Initiatives, Anti-Racism, Accessibility and Equity – External Services

- Complaints from customers experiencing inequitable services
- General inquiries about services

Finance (Revenue) – External Services

- Making payments
- Asking for a copy of bills
- Account status inquiries
- Information about refunds
- Accounts receivable inquiries
- General revenue inquiries
- Ownership changes
- Adding/changing accounts

Legislative Services – External Services

- Elected Official office calls
- Information about council meetings
- Marriages and oaths
- Burial information
- Freedom of information
- General clerk's office inquiries
- Election related inquiries

Human Resources – External Services

- Inquiries about volunteer opportunities
- Inquiries about employment opportunities

Fire Rescue (Non-Emergency) – External Services

- Book an inspection
- Submit a fire plan for review
- Request a fire code violation search
- Contact a public education officer
- Lock box calls
- Referring fire alarm testing to dispatch
- Complaints about rental housing that would lead to inspection requests
- Hydrant outages
- Alarm panel outages

Municipal Enforcement – External Services

- Snow/ice on sidewalks
- Property standards and lot maintenance
- Licensing for rental units
- Business licensing
- Zoning
- Pool enclosure permits
- Fence complaints
- Permanent and portable sign complaints
- Lighting complaints
- Noise complaints
- Parking complaints
- Open air fire complaints
- Graffiti on public property
- Insecure vacant building

Recreation Services – External Services

- Program inquiries and registration
- Facility booking rentals and inquiries
- Point of sale payment for programs and facility bookings
- Scheduling information
- Complaints and concerns
- City of Waterloo facility and program inquiries
- General City of Waterloo inquiries

- Support service provisions for the Community Pavilion
- Warming / cooling stations
- Service delivery

Community Programming and Outreach Services – External Services

- Inquiries about grant programs
- Inquiries about fee assistance programs
- Inquiries about PAL card
- Inquiries about senior programs
- Inquiries about Rec and Leisure programs
- Inquiries about affiliation
- Inquiries from affiliated groups
- Community donation and fundraising campaigns
- Complaints and concerns with Community Programming and Outreach Services
- Home Support Services inquiries
- Support with HSS payments/bills
- Outdoor rinks
- Community gardens
- Museum hours of operation
- Museum exhibit inquiries
- Museum programming information
- Museum information for archival research
- Service navigation

Parks, Forestry, and Cemetery – External Services

- Cemeteries and crematorium inquiries
- Grass cutting calls
- Trail repair calls
- Parks and event booking
- Sport field usage and booking
- General park inquiries
- Playground
- Garbage / dumping
- Graffiti
- Invasive species
- Encroachment / bylaw
- General park maintenance and upkeep
- Snow removal on sidewalks/trails
- Bechtel Park
- Trees in decline
- Storm damage to trees

- Unhealthy trees
- Dead branches / trees
- Weed requests

Facility Design and Management Services – External Services

- Alarm calls
- Homeless encampments
- Calls for sharps / needles
- Intoxicated people on property
- Water gongs ringing
- Buildings left unlocked or opened
- Blue panic pull stations (uptown parkade)
- People not abiding by rules at City of Waterloo skate parks or outdoor rinks
- External tenants that have contacted building maintenance because their keys do not work
- Fences / gates that do not open
- Calls from police to secure a facility that was vandalized
- No staff at parks
- No lights on
- Picnic shelter is not ready for Customers
- Buildings not being opened or staffed for meetings
- Sports facilities not open when there is a program booked
- Hydro is out
- Offensive graffiti

Transportation – External Services

- Leaf collection
- Potholes
- Sweeping
- Snow plowing
- Sidewalk and boulevard repair
- On-street parking permits
- Signage
- Streetlights
- Animals
- Garbage on the roadway
- Construction
- Curb cuts
- Repair driveways for work that was done by the City
- Accident cleanup
- Salting request
- Plow damage

- Snow loading
- Road closures for accidents

City Utilities – External Services

- Water on/off
- Sewer backup
- Curb stop repair
- Locates (internal and external)
- Fire hydrant issues
- Catch basin
- Manhole cover off
- Watermain break
- Billing issues
- Dirty water
- No water
- Water meters
- Sewer calls (odor concerns)
- Sewer backup
- Residents wondering why City workers are at their property
- Low water pressure
- Flooding
- Problems in construction areas

Building Standards – External Services

- Building permits
- Inspections

Engineering Services – External Services

- GIS
- Site alterations
- Road repair
- Sidewalks
- Other construction items

Planning – External Services

- Rental licenses
- Business licenses
- Zone changes
- Zoning by-law/compliance

- Site plan review and approvals
- Draft plan queries and submissions
- Official plan policy / amendment
- Demolition control
- Sign variance committee
- Fence variance
- Committee of adjustment
- Heritage
- Environmental planning
- Subdivision
- Condominium

Appendix B. Task 1 Opportunities for Improvement

No	Engagement	Opportunity	Related Project Goal
1	Corporate	Identify a Corporate Customer Service leader.	Centralized strategy
2	Corporate	Develop a Digital-first Customer Service Strategy.	Centralized strategy Regular Hours
3	Corporate	Develop a Corporate Customer Service Standard that defines performance goals, objectives, quality standards and feedback requirements by channel.	Centralized strategy
4	Division	Develop division Customer Service Standards that includes each service, aligned to Corporate Customer Service Standard.	Regular Hours
5	Corporate	Develop a process to publish and maintain an Internal staff directory.	All
6	Corporate	Develop a process to publish and maintain an external Corporate Service Catalog.	All
7	Division	Develop Employee performance goals and objectives, aligned to division Customer Service Standard.	Regular Hours
8	Division	Develop a prioritized list of service requests for digital-first process review, based on frequency and time required to address.	Regular Hours
9	Division	Develop a self-service strategy for highest priority digital-first service requests.	Regular Hours
10	Division	Conduct an After Hours process review of the Area Municipality Call Centre. Includes a cost/benefit analysis of contact centre alternatives, identifying call scripts to improve effectiveness at first point of contact, identifying steps to address data quality issues at first point of contact, identifying steps to reduce complexity and improve consistency in routing service requests.	After Hours
11	Division	Conduct an After Hours process review for Municipal Enforcement. This includes a cost/benefit analysis of contact centre alternatives and identifying steps to address data quality issues at first point of contact, identifying steps to reduce complexity and improve consistency in routing service requests.	After Hours
12	Corporate	Train Supervisors/Managers on Phone channel best practices (i.e., greetings, voicemail, auto attendants, hunt groups, queues, call recording)	Centralized strategy Regular Hours

No	Engagement	Opportunity	Related Project Goal
13	Corporate	Train Supervisors/Managers on Customer Service leadership best practices in preparation for organizational and cultural changes in Customer Service strategy.	Centralized strategy
14	Division	Develop Regulars Hours Phone process improvements, aligned to Corporate Customer Service Standard.	Regular Hours
15	Division	Train Supervisors/Managers on email channel best practices (i.e., shared emails, auto responses, integration with service request system).	Centralized strategy Regular Hours
16	Division	Develop Regular Hours Email process improvements, aligned to Corporate Customer Service Standard.	Centralized strategy Regular Hours
17	Division	Identify external service requests with internal service requests dependencies between divisions, where internal service level agreements are needed.	Centralized strategy Regular Hours
18	Corporate	Develop a procedure for On-Call Operators to utilize CEMS to rapidly disseminate requests for operational support.	After Hours
19	Corporate	Optimize the "Report an Issue Online" web form to align with the external Corporate Service Catalog.	Regular Hours
20	Corporate	Optimize configuration of main auto attendants (City Hall, Service Centre)	Centralized strategy Regular Hours
21	Corporate	Resolve known Telephony System support issues (e.g., auto attendant misconfigurations, staff no longer with the City).	Regular Hours
22	Corporate	Enable divisions to make routine phone system configuration updates (i.e., Hunt Group updates, up-front messaging for auto attendant to reflect current events and situations)	Regular Hours
23	Corporate	Conduct a cost/benefit of analysis of increased utilization of SMS for tracking service requests.	Centralized strategy Regular Hours
24	Corporate	Conduct a cost/benefit of analysis of increased utilization of PCS software for tracking service requests.	Centralized strategy Regular Hours
25	Corporate	Select and implement a Customer Service system-of-record (Customer Relationship Management software)	Centralized strategy
26	Corporate	Evaluate technologies for automated filtering and routing of Customer Service emails.	Centralized strategy Regular Hours

No	Engagement	Opportunity	Related Project Goal
27	Division	Document Regulars Hours Phone procedure.	Regular Hours
28	Corporate	Develop options to address inconsistencies in On-Call Supervisor/Manager roles, responsibilities, and compensation.	After Hours
29	Corporate	Develop a Customer feedback mechanism for each channel that becomes an integral part of the Customer Service process.	All

DRAFT: Customer Service Leader Secondment Description

Summary

The Corporate Customer Service Leader oversees the development and implementation of organization-wide initiatives that improve Customer Service delivery and ensure the Customer Service experience is modern, digitally enabled, and constantly evolving. This senior-level position is responsible for managing the progress of all City departments and ensuring everyone is working towards these goals and objectives.

Job Purpose

- Plan and lead the delivery of the Customer Service project across all City services.
- Coordinate, plan, and deliver the program of change required to achieve the City's ambitions for Customer Service improvement ensuring the principles are embedded in all aspects of the Customer Experience Journey.
- Act as the champion for Customers, ensuring they are central to decision making in all Customer facing projects.
- Work closely with Corporate Communication and IMTS to ensure synergy between the Digital Strategy and the Improvement Journey and ensure activities are sequenced effectively and resourced appropriately.
- Identify and develop the data and information sources which will provide the City with the necessary insight to allow the organization to improve Customer Service.
- Inspire and provide leadership to senior managers across the City to achieve the Customer Service improvements.

Accountabilities

- Work with the Customer Service Steering Committee to develop and lead the strategic objectives, tactical priorities and operational plans which will underpin the Customer Service Improvement project, to ensure that the identified outcomes, improvements, and benefits for the City and its customers are realized.
- Work with CMT, the Director of Corporate Communications, and the Steering Committee to develop and communicate the changes that are necessary to deliver the Customer Service Improvement Journey.
- Work with the City Leadership team to ensure that the business change requirements, external factors, and internal factors which influence and impact Customer Service are identified, analyzed, understood, and reflected in the Customer Service Improvement plans.
- Develop new, innovative, and agile approaches which will drive change in the City and improvements in Customer Service.
- Develop and lead co-design opportunities with staff, change agents and key stakeholders including service users and customers.
- Manage budgets associated with the Customer Service Improvement project and associated activity.

Skills and Abilities

- A demonstrable record of leading change activity.
- Significant experience of leading Customer-facing programs and services.
- Experience with setting defined program KPI's and ensuring progress against performance is monitored effectively with regular reporting to senior levels.
- Experience leading effective co-design opportunities with key stakeholders (including service users and customers) in order to deliver robust, efficient and fit for purpose solutions.
- Significant professional and/or management experience of a strategic operation/service.
- A demonstrable record of delivering high quality outcomes against challenging objectives and resources.
- Experience engaging, guiding, and influencing senior managers within the area of responsibility.
- Experience leading, inspiring and motivating teams to drive services forward, achieving high quality delivery within reducing resources.
- Experience with working across services outside of the area of responsibility to ensure delivery of corporate objectives.
- Experience with working across services within multidisciplinary teams; managing projects and teams outside of direct line management.
- Ability to lead, develop, manage and motivate services and teams in a challenging and rapidly changing environment.
- Ability to quickly build credibility with senior managers and stakeholders and successfully influence key decision makers at senior levels.
- Ability to translate data and insight into business improvement, delivering tangible and measurable benefits.
- Ability to envisage, design and embed services which are compliant and fit with the wider organizational strategy.
- Ability to utilize significant judgement to lead the design and delivery of a service/collection of services and operational business plans to resolve service issues or improve services, including creative and innovative thinking and risk assessment.
- Comprehensive understanding of the activities and objectives of the City, both current and future and translation and implementation at local level.
- Effective leadership and management of a diverse workforce to support excellence in service delivery.
- Good understanding of the political context at a regional and local level and working with members in a constructive and sensitive way.
- Successful financial management within a context of decreasing resources.
- Strong analytical and problem-solving skills and the ability to look ahead and understand implications of future initiatives within the area of responsibility.
- Strong project and change management skills.