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**Subject:** Integrated Customer Service Modernization Strategy Update

**Report to:** Corporate Services Committee

**Report date:** Wednesday, September 15, 2021

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## Recommendations

1. That this report be **RECEIVED** for information.

## Key Facts

- The purpose of this report is to inform Council on staff's progress with respect to the Integrated Customer Service Modernization Strategy (part of Council Strategic Priority 4).
- The modernization of customer service and improving access to Regional services has been one Council's strategic priorities since 2015, with \$200,000 approved in the 2016 budget to develop an Integrated Customer Service Strategy.
- On December 8, 2016, Council approved an additional \$1,485,000 (for future initiation) towards the customer service strategy for a total budget of \$1,685,000.
- Report GM 11-2018 (September 2018), proposed an integrated model that leverages information, data, and connected technologies in order to provide a seamless customer experience across Region services.
- During 2019 and 2020, staff engaged in a series of small-scale pilot projects testing how best to consolidate services and modernize customer service.
- As indicated in CWCD 2021-183 (August 20, 2021), the COVID-19 closure of Region Headquarters to the public provided an opportunity to improve customer service and to address a number of security issues that have arisen since the project was first initiated.
- The construction of a new Customer Service Desk at the Campbell East entrance and the consolidation of three customer service functions (Campbell West, Public Health and Community Services reception desks) into a Corporate Customer Service team is a major milestone in realizing the Region's customer service strategic plan.

## **Financial Considerations**

The operating budget for Customer Service was approved in the 2018 Levy budget. As of 2021, the total annual operational approved budget is \$399,186.

There is also a capital project (20000116) for Customer Service initiatives that was approved in 2016 (initiated in 2018 per Report GM 11-2018) with a total budget of \$1,685,000. The total spent and committed against this project is \$536,457, leaving a balance of \$1,061,364.

## **Analysis**

### **Background**

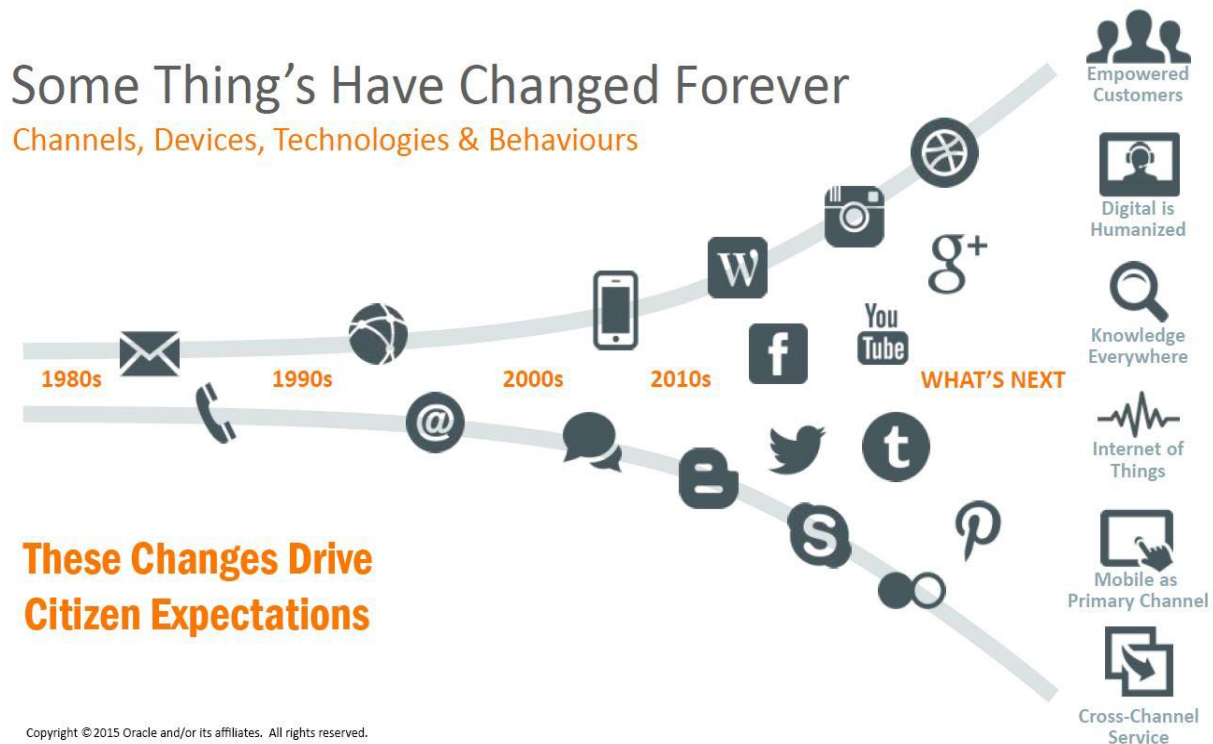
Improving customer service and access to Region services has long been a priority for Council with the 2015 strategic plan introducing an integrated customer service model intended to resolve the confusing maze of multiple access points for Region services (2015 Strategic Priority: Do business differently/ organizational excellence).

Subsequent focus groups and public engagement surveys have highlighted the importance of an integrated model with concerns ranging from:

- A lack of consistency with customer service across the different departments;
- Confusion on how to access Region services due to multiple and disconnected channels (in-person, over 100 telephone numbers, email, and social media accounts);
- Issues with wayfinding at Headquarters, and also the different service desks at other locations; and
- No effective means of tracking answers or service quality.

The project evolved into the Integrated Customer Service Modernization Strategy adopted by Council in 2018 (Report GM 11-2018). A customer-focused model, the strategy proposes the consolidation of customer services across the different departments and municipalities leveraging technology to provide easier and convenient access to Region services. Along with consistency across different levels of service, the new model proposes a “no wrong door” approach with services and service status easily accessible anywhere and anytime regardless of the point of entry.

Since 2015, customer service expectations have increased exponentially due to advances in online banking and shopping and the ease of access provided by smartphones and consumer applications. Although not uniform, most municipalities offer some level of complimentary digital service channels, the Region included. When COVID-19 forced a shutdown of in-person service, the Region already had some infrastructure in place and we were able to nimbly re-focus service delivery to chat lines, emails, telephone and video calls, online payment streams and enhanced information on our web pages. As restrictions have loosened, some Region services have returned with in-person appointments only. As we move to re-opening in-person service, the importance of a multi-platform access model has never been clearer, and any modernization strategy will have a large technology component.



### Service Modernization 2019-2022 Strategic Plan

In 2018, a Customer Service Steering Committee made up of staff from Corporate Services, Community Services, Corporate Administration, IT, Planning & Development Services, Public Health and Public Works was tasked with implementing the integrated strategy. One of the guiding documents for the work undertaken to date is the Service Modernization 2019-2022 Strategic Plan with the following Vision, Mission and Goals:

**Vision:**

To foster a citizen focused approach to service innovation and integration that enables operational efficiencies.

**Mission:**

To maintain an iterative approach to the implementation of technology that embraces customer-focused, data-driven, efficient, and inclusive principles.

**Goals:**

1. Customer Focused and Data Driven Decision Making
2. Modernizing the Service Experience
3. Inclusive Collaboration and Partnership

Each of the goals listed above has resulted in numerous small-scale pilot projects grouped around six themes: Development of a Corporate Framework; Establishing Data Foundations around Service Transactions; Expansion of Digital Communication Channels; Updating Tools to Manage Corporate Content; Service Delivery Enhancements; and Development of Community Partnerships. Each of the pilot projects measures success against the plan's Goals ensuring we deliver an easy, simple, and streamlined service experience. This iterative approach allows for lessons learned, data analysis and customer input and staff have been progressively adapting the resulting business processes and operations to suit.

Many of the pilot projects has resulted in enhancements to customer service across Region departments and directly informed the consolidation of customer service at Region Headquarters:

- The consolidation of incoming telephone lines (where possible);
- The use of call centre software;
- The introduction of one after-hours service line (through the Transportation Dispatch Team);
- The use of service transaction trackers and knowledgebase software;
- The launch of Web Based Chat for Public Health and Community Services;
- Making public access Wifi available at several regional facilities;
- Cross training for customer service staff; and
- Increased wayfinding at Headquarters.

### Consolidated Customer Service at HQ

An integrated customer service model with consolidated front line service delivery and omni-channel services has been successfully implemented in many neighbouring municipalities including Burlington, Oakville, Halton, Hamilton, Peel, St. Catharines, Waterloo, and York. Moving regional services to a similar model will promote a simple, seamless integrated customer experience across the organization while also maintaining autonomy for divisional / partner service delivery. As described in CWCD 2021-183, the new Customer Service Desk at Region Headquarters is currently under construction and is a major milestone step in modernizing customer service at the Region.

Navigating the public facing services offered by the Region can be challenging to the public with confusion around the organizational structure, the physical location of different services, and the types of services offered by the levels of municipal government. For example, Region Headquarters currently has two prominent entrances and three reception desks providing first contact service, two of which are specific to department services. Entering from Campbell East, there is no reception desk providing a point of contact to make visitors feel welcome, to answer questions or direct members of the public to the appropriate service counters or staff members. Although we have made progress over the past few years, there remain multiple access points for Region services with well over a hundred phone numbers, websites, email addresses and social media accounts with public facing services spread out across multiple departments in the building and multiple building throughout the Region. For the most part, each department and service manages their own inquiries with no common corporate tracking or reporting in place. Despite individual staff consistently providing a high level of service, the current decentralized model can result in a disjointed customer experience that is time consuming and frustrating to the public while also not making the best use of staff resources. Lacking consistent guiding principles at an organizational level and a centralized source, gaps remain in how customer service is offered and tracked across the Region's departments. As well, recent events at Region Headquarters has identified the need for better security and access control for staff and all who visit the building.

Due to COVID, we currently have a unique opportunity to implement changes in how we provide customer service at Headquarters while minimizing the impact on the public. The new Customer Service Desk consolidates the three reception desks at HQ into a new Customer Service Team and provides "one stop shopping" for members of the public and clients accessing Region services. The six other reception desks at HQ

remain embedded within the departments with the public directed to the different departments as needed for specific second tier services

Along with the consolidation of first tier customer services, the new customer service desk provides a single point for public access to Regional Services offered at Region Headquarters. The introduction of an automated turnstile entrance/exit to access in-person Region services will provide for greater access control for staff and members of the public, ensuring we know who is in the building in the event of an emergency such as a fire or life safety event. The turnstiles are designed not to create a visual barrier within the CE foyer and can be set for free-flowing access between the International Plaza and the Public Entrance doors.

Construction on the new desk is scheduled to start mid September and be open to the public January 2022. While under construction, staff access will remain via the Campbell East doors and should in-person services resume at Headquarters, the public entrance will temporarily be via the Campbell West doors.

The consolidation of the customer service function has led to some organizational changes as well. In January 2021, the Campbell West customer service staff moved to the Construction, Energy and Facilities Management (CE&FM) division in Corporate Services providing divisional and management support for the team. In order to maintain services during the consolidation, staff continued to follow a phased approach with the Public Health Customer Service Representative position and 3 Public Health reception phone lines merging in June 2021. The Community Services Customer Service Representative position and phone line consolidation is on track to be completed for October 2021. Once fully consolidated, the new Customer Service team will include four Customer Service Associates and the Supervisor, Customer Service with no net new FTE added to the Region's staff complement.

While COVID-19 Public Health measures remain in place, the Customer Service team includes three temporary Screener positions located at the Campbell East entrance. And, nine temporary call centre staff have been added to the Customer Service team to support to the Region COVID Call Centre operations, providing answers to general COVID related inquiries and directing callers to the appropriate Tier 2 COVID Call Centre operated by Public Health.

In addition to providing an improved customer experience, the consolidated customer service team offers many operational benefits through improved staff utilization, consistency of customer service response and efficiency in service. The layout of the

new desk will provide greater control of access to headquarters with all visitors, contractors and clients checking in at the desk.



Image 1: View of customer service desk from Campbell East entrance

Working in cooperation with other Regional departments, the new Customer Service team has expanded on the many operational and business processes improvements initiated in the past few years. Leveraging technology, staff in multiple Regional departments now have access to a shared digital knowledge base with over 800 articles about Region services updated in real-time to provide the most up to date information to Region clients. Staff also have access to language translation services facilitating consistent and accurate service to the Region's diverse community and in their preferred language. The merging of multiple departmental telephone numbers to one incoming customer service line has allowed for processing of higher call volumes and consistent call management with an average of 1500 – 1850 calls per week now handled by three Customer Service Associates with very short wait times and minimal dropped calls. The Customer Service team now tracks call line KPIs making data driven decisions for scheduling staff during peak call times, reducing wait times and improving customer experience.

During the pandemic response, 1st Tier COVID Call Centre functions were transitioned from Public Health to the Customer Service team on April 26. The 1st Tier COVID Call Centre currently averages 350 calls daily with peak call volumes of 700 calls per day following provincial announcements and changes to the Regional Immunization service

delivery, with callers experiencing less than a 2-minute average wait time and 2% rate of abandoned calls.

### Next Steps

While the work already completed to consolidate front line customer services at Region Headquarters has been a major milestone in modernization, it is only the first phase in planned improvements. Many of the initiatives listed below were already underway prior to COVID-19 and have continued to be developed during the pandemic.

#### Short term:

- Continue to expand Knowledgebase and content users;
- Expand the variety of Customer Service first tier response items;
- Manage room bookings and events by external parties and use of International Plaza;
- Launch digital platforms including online Chat functions for the Customer Service team, webpage content updates, email question submissions and payments for various Regional services;
- Develop associated policies and procedures: room booking, International Plaza event coordination, online payment, etc.;
- Develop a Corporate Customer Service Policy;
- Add Point of Sale to front desk allowing for payment collection for various services: residential garbage tag sales, Niagara Regional Housing Payment processing, etc.;
- Explore synergies with other departments and services towards migrating first contact enquiries to the Customer Service Team; and
- Develop branding for the Corporate Customer Service team and new desk.

#### Long term:

- Tender and selection of Customer Relationship Management software to facilitate improved efficiency and to manage individual customer relationships across service interactions through service request intake, tracking and resolution.
- Regional Website Customer Service content management
- Expanded hours of coverage including evenings and weekends for events



## Regional Relationships with LAMS

In April 2018, a Niagara customer service network was established to enable collaboration with and between Niagara local area municipalities and public sector partners to explore enhanced and integrated customer service opportunities. During the pandemic this initiative was put on hold. As we move out of pandemic operations, the Region will be looking to re-establish this work and continue to work together for a consistent customer service approach.

## **Alternatives Reviewed**

Not applicable.

## **Relationship to Council Strategic Priorities**

The modernization and integration of customer services at the Region directly supports Council's Strategic Priority 4 of Sustainable and Engaging Government and Objective 4.1: High Quality, Efficient and Coordinated Core Services and illustrates the Region's commitment to high quality, efficient, fiscally sustainable and coordinated core services through enhanced communication, partnerships, and collaborations with the community.

## **Other Pertinent Reports**

- GM 11-2018 Integrated Customer Service Modernization Strategy
- CAO 15-2018 Public Opinion Research on Resident Communications Preferences and Satisfaction Rates for Programs, Services and Customer Service
- CAO 17-2018 Council's Strategic Priority Projects 2015-2018 Term in Review

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**Appendices**

Not applicable.