CSD 8-2023

Appendix 1

Customer Service Digital Modernization Report

By Gooder Marketing Inc.

For the Regional Municipality of Niagara

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Executive Summary

The proposed-three year plan detailed in the Customer Service Digital Modernization report provides a blue print to transform customer service at the Niagara Region. Leveraging technology and previous improvements, the plan will result in a seamless customer experience across multiple platforms with consistent and personalized service anytime anywhere.

Along with modernizing customer service, the Region's goals included:

- Ability to track, manage and measure customer transactions;
- KPI used for continuous improvement;
- Data driven decision making, and;
- Realizing operational efficiencies.

The report is organized into four sections. The first provides context and objectives for the report. The second is a detailed gap analysis reviewing all of the modes of customer service offered at the Region with a description of current service levels followed by a list of identified gaps and opportunities for improvements. The third presents the proposed three-year plan based on four guiding principles:

i. Being Customer Focused
ii. Moving to a Personalized Customer Experience
iii. Modernizing In Person Service
iv. Moving to Data Driven Decision Making

The final section speaks to collaboration and partnerships across the Region departments and extending it out to other local area municipalities.

In a post Covid-19 world, the importance of a multi-platform access model has never been clearer, and any modernization strategy must have a large technology component. The plan proposes 14 improvements over the next three years. Although some are process driven, the majority involve the introduction of new technology or applications with each year building upon the previous:

- **Year 1 (2023) – Foundational Software and Processes**
  - Ticketing System
  - Knowledge Base
  - Chat Bot / Live Chat Software
  - Visitor Management Software

- Room and Event Booking System
- Online Payments
- Customer Service Feedback

- **Year 2 (2024) – Analysis and Metrics**
  - Data Collection and Analysis
  - Telephone System Upgrade
  - Web Platform

- **Year 3 (2025) – Digital Improvements**
  - Self-Serve Web Options
  - General Contact Forms
  - Personal Contact Information Removal
  - Social Media Direct Messaging

Year 1 recommendations were selected based on their achieving the best overall improvement to the customer experience across all departments and improving the in-person service. Year 2 will focus on analysis and measurement in order to quantify savings and efficiencies and establish metrics and levels of service. Year 3 will add further functionality to some of the Year 1 initiatives while also shifting focus to the Region's web pages and social media channels. While each recommendation will function individually, phased implementation of all of them is key to meeting the Region's goals.

In addition to transforming the customer experience at the Region, the successful implementation of the 3-year plan will result in operational efficiencies and cost savings. Although a few of the improvements provide an analysis of projected savings, there is insufficient data to quantify the resultant efficiencies or the cost savings achieved through a fully implemented plan. This will be one of metrics developed during Year 2.

1. Objectives

Early 2022, the Regional Municipality of Niagara (the Region) was awarded a provincial grant as part of the Audit and Accountability Fund. These funds utilized to conduct a service delivery review with the goal of finding efficiencies and modernizing front-line customer services. The Region's application proposed a review of customer services provided across the different departments and examine modernization via digital service delivery.

The deliverable is this Consultant report providing specific and actionable recommendations for the modernization of the Region's customer service by leveraging technology and moving to a multi-channel delivery. The end goal is to improve the customer experience at the Region by providing a seamless experience across multiple platforms and delivering consistent and personalized service anytime and anywhere. In addition, the Region is looking for customer service improvements to achieve operational efficiencies through improved staff utilization, consistency of customer service response, efficiency in service and continuous improvement.

Project Objectives are to:

- Provide increased services at first point of contact (HQ Customer Services) based on migration of suitable / complimentary customer service functions from multiple locations/departments at HQ;
- Increase access to online digital services;
- Provide enhanced ability to measure and manage incoming customer transactions;
- Improve facility related services around facility booking, security and facility call in-take;
- Determine guidelines for the development of a corporate Customer Service Policy;
- Determine customer service metrics based on industry standard best practices;
- Achieve consistent application of service delivery and visitor policies and procedures;
- Move to data driven decisions regarding the end-to-end citizen experience and allow for customer focused improvements to Region services;
- Identify client requirements and develop specifications for a suitable customer relationship management software for information collection, ticketing, follow up, resolution and data collection, and;
- Ensure coordination with and look for synergies with Web and Communications initiatives.

2. Customer Services Working Group and other Synergies

Improving customer service and access to Region services has long been a priority for Council. In 2019, the Service Modernization 2019-2022 Strategic Plan was developed with the following goals:

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

Initial work under the plan included a series of pilot projects culminating in the formation of the Corporate Customer Services team in 2021 (Phase 1) and Phase 2 is the subject of this report.

A Region Customer Services Working Group was established with membership from all departments/divisions that have a direct involvement in providing customer services at the Region. This group is actively involved in Phase 2 as part of brainstorming sessions and consultations relating to all customer service provided at the Region. Their input was critical in exploring potential opportunities from a customer perspective and specific to service provided.

Other Initiatives underway:

As indicated above, the Project will provide a path forward with the modernization of customer service at the Region. In addition to the Project, there are two other initiatives underway at the Region that tie to closely with the Project both of which inform the deliverables.

Web Content Management Platform review: Led by IT, the project proposes a new Region web platform in order to deliver an optimal digital customer experience and provide timely information to Region citizens. The current platform is not proactive and does not effectively leverage niagararegion.ca as a communication and digital service platform. Project start is scheduled late Q1 2023 with go live date late 2023.

Telephone System Upgrade: The current telephone system is at end of life and there is no further capacity for expansion nor are there updates available to support continued usage. In addition, the current system has limited capacity for the data collection, analytics and reporting needed for effective service levels. Project start is scheduled late Q1 2023 with go live date late 2023.

3. Gap Analysis

The Consultant reviewed the following supporting documentation in relation to the Digital Modernization project:

- AtFocus Report (2018)
- CSD 49-2021 Integrated Customer Service Modernization Strategy
- Web Project Introduction Powerpoint

The Consultant also conducted brainstorming sessions with the Customer Service Working Group, the IT Web Project leads, Strategy and Communications staff as well as numerous information gathering sessions with the Region's Project team. In addition, the Consultant reviewed data from the Customer Services data collection tools and online resources such as Region website and social media accounts.

The Gap Analysis section of this report identifies all modes of customer service currently provided by the Region: in-person, telephone, email, web and social media. Each mode of service is outlined below based on current service delivery processes with opportunities for improvement or gaps identified.

The needs and preferences for how consumers access services in today's society have shifted in recent years. While some customers rely on in-person service out of preference or lack of digital mode of connection, many prefer to connect with service providers through digital means that allow for increased ease of service, convenience or accessibility.

A. In Person Inquiries at Niagara Region Headquarters

i. Current Service Delivery

The Customer Service transaction counter at Niagara Region Headquarters serves in-person customers with inquires related to all Regional departments / divisions, services, and programs. Following the recent integration of the Public Health reception and the Community Services reception positions, the Customer Service team now performs most 1st tier services and inquiries. Services provided at the front desk include: information and material distribution; collection of incoming materials for internal staff / departments; payment processing for Housing Services and Clerks; collection of water and tick samples for Environmental Health, and; support for Visitor and Contractor access control.

The Customer Service team aims to resolve all inquires at the point of transaction, when possible. Based on the nature of the customer's request, there maybe a referral to an internal department/division or another staff for further support. Referrals are currently done through telephone extension or email with the potential for miscommunication or the wrong person receiving the referral.

There is no ticketing system or data collection related to first (1^{st}) tier services or transfer to second (2^{nd}) tier support (program related). The Customer Service team uses various manual applications to track service level volumes and in-person inquiry types. The basic information captured by the Customer Service Associates indicates type of inquiry only (department, program, etc.) and does not capture contact information for the customer.

The Customer Service teams relies heavily on an application led knowledge base for information referencing. The knowledge base tool is comprised of 800+ individual knowledge pages relating to many Region departments/divisions, programs and services. Currently, the Customer Service team is responsible for the creation of information pages as well as the maintenance and accuracy of the information as it changes.

ii. Gaps / Opportunities for Improvement

- Basic tracking of types of inquiries or service requests – through manual tracking system with a large margin for error given that it relies on staff inputting each interaction type. Also, lacks ability to run reports or tabulate data – currently done manually by staff.
- Inquiries may be routed to incorrect Regional staff based on limited program or service information available to Customer Service Associates or unclear request from customer.
- With no ticketing system, the Region is unable:
    - To make data driven decisions for scheduling and staff needs based on service volume trends/patterns
    - To collect customer information: demographics, types of service request, method of request, etc.
    - To effectively track requests and determine if service was completed, particularly once a customer is referred to another department or staff member.
- No effective means to gather customer feedback.
- Hours of operation for Headquarters Customer Service are Monday to Friday 8:30 AM to 4:30 PM. These hours may not be convenient for customers who cannot access or call during these limited business hours.

iii. Satellite Offices

The Region offers a range of program specific services at various satellite offices throughout the Niagara Region. The satellite office staff are not part of the Corporate Customer Service team and report to other departments in the Region. Although there are no shared applications in use between Customer Service and the satellite offices, there is a manual work around. The supervisors / managers for the satellite offices will inform the Customer Service team about important programs changes or closures with the common goal of providing accurate information to all callers.

The gaps in service level for satellite offices are similar to those indicated above.

B. Visitor Access at Region Headquarters

i. Current Service Delivery

The Customer Service team is responsible for welcoming visitors and contractors to Regional Headquarters. All visitors must enter through the Campbell East Public Entrance and present at the Customer Service transaction counter. At which point, a Customer Service Associate will greet the visitor, confirm the reason for their visit, advise appropriate staff of the visitor (via telephone or Teams), and issue a temporary visitor badge. Some internal groups / staff advise the Customer Services team in advance of planned meetings, visitor or contractor appointments to assist in the sign-in process (through the Vine Customer Service portal or by email).

Depending on the location of the meeting or appointment, the internal departmental staff may be required to escort the visitor to the internal location. At the completion of the meeting or appointment, the visitor returns the visitor badge to Customer Services.

ii. Gaps / Opportunities for Improvement

- Handwritten visitor logbooks open on the transaction desk when staff are recording names of visitors pose a threat to security and information privacy.
- There is no collection of data related to visitor access to Niagara Region Headquarters that can be used for purposes of security, data driven decisions based on service volumes or feedback collection from visitors.
- Handwritten visitor logs are ineffective for recording, verifying, and tracking visitor responses.
- No online method for visitors/contractors to pre-register their visit.

C. Room and Event Booking at Regional Headquarters

i. Current Service Delivery

Regional Headquarters has several multipurpose spaces plus the International Plaza that are available for internal and external client use. Prior to COVID, there was a basic process for room and event bookings at Regional Headquarters but with reopening to the public, there is no formal policy or procedure dictating the room and event bookings. The CE&FM team, including Customer Service, Facilities Management and Security are in the process of developing a policy and associated procedures to support the Fees Bylaw (existing) to be reviewed by Region Council late Q1 2023. Until the new policy is in place, rooms remain available for internal client use only.

ii. Gaps / Opportunities for Improvement

- Need for consistent application of fees based on user group as outlined in the Fees Bylaw.
- Review of security needs and reference to Access Control policy.
- Janitorial and facilities set up requirements to be clarified for consistent application.
- Need for on-line booking system application for scheduling, ticketing and tracking of booking requirements.

D. Telephone Inquiries

i. Current Service Delivery

Following the integration of the Public Health reception position and the Community Services reception position to Customer Services in 2021, all incoming telephone lines to Niagara Region Headquarters funnel into one queue, supported by Customer Service Associates. Hours of operation are Monday to Friday 8:30 AM to 4:30 PM during which time they will receive the majority of inquiries by telephone. Currently the team handles 1800-2500 incoming telephone calls per week and is tracking to a total of 95,000 calls in 2022. Although it is difficult to compare call volume year to year as it fluctuates based on time of year and current local, Regional, provincial or federal events (such as pandemic), there has been a significant increase in call volume since reopening to the public.

With the consolidation of the multiple reception positions into Customer Service, the team has made significant improvements with respect to telephone services that customers receive consistent, accurate and quality customer service with every call. Despite the improvements, there remain challenges due to legacy systems or processes.

- The Customer Service team relies on a Knowledge Base application, the Region website and real-time internet searches as they answer questions relating to Region departments, programs and services.
- Incoming phone calls are greeted by a pre-recorded message offering callers multiple options – dial by extension, voice recognition for name or department or dialing 0 for Customer Service Associate.
- The Customer Service team uses telecoms applications for data collection related to call volumes, handled times, wait times and abandoned call percentage with metrics compared to best practices. There is no level of service or policy in place.

ii. Gaps / Opportunities for Improvement

- Telephone system has limited capacity for reporting, capturing information related to call transfer locations or rate of transfer, and data analytics for data driven decisions.
- No ticketing system for assignment to another department / division.
- Numerous telephone numbers posted externally for all departments / divisions that do not funnel to Customer Service. This can result in inconsistent level of service and information provided as well as inability to collect fulsome data for all incoming phone calls to Region.
- Documented challenges with voice prompt/recognition system which may result in misdirected calls and longer customer wait times.
- Pre-recorded messages are managed by telecoms, with no synergies to Customer Service.

E. After Hours Telephone Calls

i. Current Service Delivery

After-hours is defined as all hours outside of Monday to Friday 8:30 AM to 4:30 PM and Holidays. After-hours telephone calls are answered with an automated message indicating that the Region is closed and directing the caller to call back during business hours. An option on the automated message advises the caller to press 0 to be connected to Dispatch for roads related inquires or emergencies.

The staff answering the after-hours calls on the Dispatch line are not part of the Corporate Customer Service team and report to Transportation, Public Works. The Dispatch line is staffed to address road and public works emergencies or events and is the only after-hours call service available if someone calls after 4:30 pm regarding any Region service.

Recent synergies have been established to increase the correlation between the Corporate Customer Service team and the Transportation Dispatch team with the goal of providing consistent, accurate information to callers regardless of the time of day. Both teams are now actively using the same knowledge base application for information gather for callers. The Dispatch team is responsible for maintaining the information pages related to Transportation.

ii. Gaps / Opportunities for Improvement

- Business hours may not be convenient for some customers who cannot access or call during these limited business hours only therefore they only have access to Dispatch.
- Transportation Dispatch staff specialize in roads and emergency management, they are less versed in all Region departments/divisions, programs and services. This could results in inconsistent level of customer service or information being provided between the two teams.
- Typically one staff on the Dispatch line. During high call volume, this may result in abandoned calls or longer wait times.
- Minimal synergies between two teams results in varying process, procedures and best practices.

F. Region Website / Email Inquiries

i. Current Service Delivery

Through the Region's website, visitors are able to send self-serve inquiries through two main methods – a Contact Us form or by providing feedback on individual pages through the "Did you find what you're looking for?" function.

Managed by Strategic Communication & Public Affairs, the Contact Us section web form is the primary method for visitors to submit inquiries. Through the form, visitors are able to select the area of the organization they are interested in and to provide comments on the types of questions or information that they are looking for. Depending on the area that they have selected, the web form is directed directly to a contact email in the division of interest or they are directed to Strategic Communications & Public Affairs who then forwards it to the appropriate division for response. More detailed inquiries and questions are treated the same as Contact Us inquiries and directed to the appropriate Regional division for a response.

The "Did you find" section is primarily used to identify errors or missing information on the website. Generally inquires submitted through this section would relate to broken links, missing information or general questions about where to find information. These inquires are directed to Strategic Communications and Public Affairs staff and are responded to directly.

ii. Gaps / Opportunities for Improvement

- Due to staffing resources, Region website inquiries are monitored during regular working hours.
- Email inquiries are not tracked once they are sent to individual divisions.
- Strategic Communications & Public Affairs is not using corporate knowledge base for reference.
- There is no ticketing system:
    - Customer Services team has no visibility to previous customer communications through the website and are unable to address subsequent inquiries should customer call or seek service in person.
    - Result in similar gaps to other services without ticketing system: lack of data driven decisions; unable to collect customer information (demographics, types of service request, method of request, etc.), and; unable track progress of request or determine if service was completed.
- Current system does not allow for data collection or analytics for inquiry volume, patterns, response rate, resolution etc.

G. Online Chat

i. Current Service Delivery

A limited number of online live chat services available through the Region's website. Each of these chat services is operated independently and are managed by the individual operating divisions (Public Health and Community Services). The live chat and bot function provides ticketing and chat management for resolution and follow up along with language translation but it is centralized and not available to other staff.

ii. Gaps / Opportunities for Improvement

- Chat function available for a limited number of programs and services.
- Software is not linked to other applications used by Customer Services.
- Siloed use by individual divisions – no best practices or efficiencies established.
- No ticketing that is visible to Customer Services: Customer Services team has no insight to customer communications and cannot reference previous discussion or inquires made by customer if they then telephone or seek service in person.
- Customers expect any time anywhere service, particularly outside of business hours.
- Division currently operating chat function use an application specific knowledge base and are not linked to the corporate wide one.
- No method of data collection or analytics for inquiry volume, patterns, response rate, resolution, etc.

H. Social Media

i. Current Service Delivery

Niagara Region maintains corporate social media channels through the Strategic Communications & Public Affairs section. Currently the Region supports the following social media channels: Twitter, Facebook, Instagram, and YouTube. Inquires to these accounts are managed by Strategic Communications & Public Affairs' staff who work with operating divisions to respond to user inquiries and comments. Social media channels are generally monitored Monday to Friday from 8:30 a.m. to 4:30 p.m. Inquires through social media channels are generally responded to within 24 business hours.

ii. Gaps / Opportunities for Improvement

- Siloed use by individual divisions – no best practices or efficiencies established.
- No ticketing that is visible to Customer Services: Customer Services team has no insight to customer communications and cannot reference previous discussion or inquires made by customer if they then telephone or seek service in person.
- Customers expect any time anywhere service, particularly outside of business hours.

- No social media management tool for better oversight of all channels and applications.
- Strategic Communications and Public Affairs is not using corporate knowledge base for reference.
- No method of data collection or analytics for inquiry volume, patterns, response rate, resolution, etc.

I. Online Payments / Region Headquarters Point of Sale

i. Current Service Delivery

Online payment options are available for multiple Regional departments and divisions including: bulk garbage tags for retailers, Regional Transit passes, business licenses, Freedom of Information requests, Transportation roads permits and Long Term Care resident payments.

In addition, Point of Sale transactions are processed at Customer Services for the following: Housing payments (rent, maintenance fees or arrears) and Clerks payments (Freedom of Information requests and affidavits). Payments can be made by cash, debit or credit.

ii. Gaps / Opportunities for Improvement

- Expansion of online payment options for all fees for the anytime, anywhere approach that consumers are seeking.
- Expand Point of Sale (POS) options for other first tier services at Customer Services for increased level of service (individual waste tags, Transit passes, business licenses, permits, etc.).

J. Customer Feedback

i. Current Service Delivery

Although there are isolated processes in place for customer feedback in the departments that deal directly with the public, there is no corporate policy or procedure in place.

ii. Gaps / Opportunities for Improvement

- Inconsistent methodology and no means to track response.
- Unable to make data driven changes based on customer feedback.
- No effective means to effect continuous improvement.

K. Key Performance Indicators

i. Current Service Delivery

Departments typically have Key Performance Indicators (KPI) related to service delivery but very little is in place for customer service. Corporate Customer Service have some loosely defined KPI related to best practice but lack the tools to track service levels.

ii. Gaps / Opportunities for Improvement

- No policy or established methodology.
- No means to track level of service, consistency of service, service improvements, etc.
- Unable to make data driven changes related to continuous improvement.

4. Future State

A. Improving Customer Experience

The previous section identified numerous opportunities and gaps with the current customer service model at the Region. Section 4 - Future State puts forward a phased plan towards improving and modernizing the customer experience by:

i. **Being Customer Focused**:

- *By tracking service requests:*
  Region has no effective means of: tracking questions or service requests for any of the channels of inquiry; determining if an inquiry is routed to the correct Regional staff; closing out inquiries; ensuring consistent customer experience; measuring customer satisfaction, and; no service history.

- *Through consistent service:*
  Different departments have different processes and in some cases use different stand-alone software. Region departments are somewhat siloed in

service delivery and there is no mechanism to ensure hand-off to the correct staff.

- *By incorporating Customer Feedback:*
  Region does not have an effective means to gather customer feedback. Previous pilot initiatives were undertaken to gather customer information for the purpose of soliciting feedback, however these initiatives were one-offs with very small response pool and did not result in any consistent feedback gathering or measuring tools.

ii. **Modernizing the Customer Experience**:

- *Through Digital Modernization:*
  Although there are multiple channels available for inquiry - in person, telephone, email, website, and social media – the functionality and ease of use that customers expect is missing. Most Region services do not offer a self-serve function allowing customers to inquire or seek support beyond business hours. Email correspondence is not tracked and the website contains outdated information and some recurring questions are not addressed. There are numerous primary social channels with no tracking in place or consistency in service. The telephone system is not intuitive and does not allow for easy handoff.

- *With Service Anytime Anywhere:*
  The online chat function is not available for most services and not available for general customer service inquiries. The website does not have a self-service portal to help users find answers and resolve their issues. Only some services can be requested and paid for online.

- *With Equity, Inclusion and Accessibility:*
  Modernization of services through digital channels will ensure increased levels of service for all members of the public. Although available, language translation service is somewhat cumbersome and not available across all current channels of communication.

iii. Modernizing In Person Service:

- *By developing visitor access procedure:*
  Handwritten visitor logbooks result in security and privacy concerns as well as a cumbersome process for access control for members of the public. Similarly, room booking for public use is difficult and inefficient.

- *Through improved security:*
  Although access control is in place at Region Headquarters, the associated visitor processes are cumbersome.

iv. Moving to Data Driven Decision Making:

- *By incorporating Key Performance Indicators:*
  Key Performance Indicators for Customer Service will allow for consistent, measurable targets for performance, quality and service levels. Metrics from KPIs will result in analytics for data driven decisions around business operations and efficiencies.

- *Continuous Improvement as Driver for Change:*
  Data collection, KPIs and metrics will allow for continuous and ongoing review of organization operations in relation to satisfaction, engagement, efficiencies and response to changing needs of the Regional customer.

B. Recommendations

The following are recommendations on how to improve and modernize customer service at the Region. Some are no cost process improvements while others involve implementation of new software. While each recommendation will function individually, phased implementation of all of them is key to success. Combined they will provide for fulsome and measurable improvements to key areas of analysis, metrics and digital services and change the customer experience at the Region.

Although a review of CRM (Customer Relationship Management) software and expanded hours of in person operations was part of the Consultant's scope, there is no recommendation to proceed with either at this point. Both are costly measures and they may not be needed once the other recommendations are implemented. At the end of 2025, the Consultant recommends reviewing service levels to determine if remaining gaps in service could be addressed by either.

There are 14 recommendations and the intention is that they roll out chronologically over the next three years, with each year building upon the previous:

- **Year 1 (2023) – Foundational Software and Processes**
  - Ticketing System
  - Knowledge Base
  - Chat Bot / Live Chat Software

  - Visitor Management Software
  - Room and Event Booking System
  - Online Payments
  - Customer Service Feedback

- **Year 2 (2024) – Analysis and Metrics**
  - Data Collection and Analysis
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- **Year 3 (2025) – Digital Improvements**
  - Self-Serve Web Options
  - General Contact Forms
  - Personal Contact Information Removal
  - Social Media Direct Messaging

Generally, Year 1 items were selected based on their achieving the most overall improvement to customer service across all departments and improving the in-person experience. Successful implementation of recommendations in Year 1 will be foundational to all other improvements. Another consideration is that they can be accomplished within the Region's approved capital budget envelope and they are largely independent of the IT led initiatives (Web Content Management Platform Review and Telephone System Upgrade). Year 1 improvements listed below include a description, a summary of operational savings and efficiencies (where available) and a detailed list of benefits.

Year 2 will focus on analysis and administration towards process improvement along with the introduction of new software coinciding with the completion of the web and telephone upgrade projects.

Year 3 is intended to build on the previous two years and will focus on improving the customer experience with the Region's web pages and social media.

Year 1 (2023) - Foundational Software and Processes

i. Ticketing System

Ticketing software organizes the customer inquiry process across multiple channels, tracking the customer experience from start to finish. If implemented across all Region departments, staff would have the ability to see all the tickets, including those tagged as high priority, track and report on how tickets are resolved across all services, and analyze response times and quality of responses. Region customers would be able to follow up based on their tracking number to get an update of the status of their inquiry and provide customer feedback through a survey.

A comprehensive ticketing system is foundational to modernizing and improving customer service at the Region and is the framework upon which all other improvements depend.

Operational savings and efficiencies:

Implementing a ticketing system will reduce staff effort, improve overall resolution rate, reduce the number of replies per transaction, and eliminate duplication of client requests. Relying on commonly accepted industry metrics, implementation could reduce overall resolution time by up to 20%.

Although the Region does not currently track resolution time, we can look at a reduction in total staff hours per day spent answering telephone inquiries: 20% of 17.5 hours would result in savings of 3.5 hours per day (across 2.5 FTE).

Other benefits:

- *Visibility across the Region:*
  The shared visibility and tracking capability inherent to tracking software; the easy access via multiple channels (in person, telephone, email, web browsers as well as mobile apps); and the ability for staff to communicate with each other and with customers from within the platform will make it far less likely that a service request will go unanswered or unresolved.

- *Collaboration:*
  The shared visibility provides collaborative workspace between team members from across all departments allowing for easy exchange of critical information in order resolve more issues in less time and multiple team members can seamlessly work towards resolving the same issue.

- *Multi-Channel Support:*
  One of the Region's goals for modernization is to provide a seamless experience across multiple channels and deliver consistent and personalized service anytime and anywhere. A ticketing system is designed to function seamlessly in a multi-channel environment while all of the requests are still funneled in a centralized system for tracking, management, and analysis.

- *Service Metrics and Continuous Improvement:*
  Ticketing systems come with the built-in ability to track vital service metrics such as average first reply time, resolution time, submission method, staff involved, visibility of past events, etc. Ticketing software also facilitates analysis: grouping individual incidents to recurring problems, fast-tracking root cause analysis and recording workarounds to minimize the impact of incidents. Some ticketing systems have integrated *service delivery dashboards.*

- *Response management - Prioritize Important Tickets:*
  A ticketing systems lets you define ticket status, priority levels and due date requirements. After reaching an established service threshold, tickets are moved to high priority status and may be escalated to management, if required.

- *Customer Satisfaction Survey:*
  Once the ticket is resolved, an automated survey can be sent to the customer for feedback on the service level.

- *Integration:*
  Some ticketing systems have a built in *CRM (Customer Relationship Management software)* option to allow client data to be entered into the system as well as an *integrated knowledge base.* And, *live chat* functionality may be a feature on some ticketing platforms.

ii. Knowledge Base

A knowledge base is an online management system that acts as a searchable storehouse to collect, organize, analyze, and re-use knowledge that would otherwise be scattered across numerous desktops and department staff. Its use facilitates sharing and easy retrieval between different departments, integrating knowledge across an organization. It can be both internal and external, allowing internal staff to easily search and find answers to support clients, and if integrated with an organization's website, allowing a self-serve option for customer to find answers on their own.

The Region's Customer Service team implemented a knowledge base as part of phase one of modernizing customer service. Although its use significantly improved customer experience there remain gaps in terms of content, how it is maintained, and which departments have access to it. In addition, there is no connectivity through the Region's webpages for a self-serve option.

Without an organized repository, staff can spend up to 20% of their time searching for information (McKinsey & Company) through inboxes, their own manual and digital files and co-workers brains. A knowledge base makes all that information accessible and searchable significantly improving resolution time, and with a consistent and correct answer.

Although the current application does not provide full functionality (particularly with respect to self-serve option and connection to a chat bot), implementing a new knowledge base system would require a significant amount of planning, collaboration and training. Therefore the consultant recommends that that the current platform remain in use for 2023 and 2024 but that access be extended out to all departments with a public facing customer service function and that procedures be put in place with each department taking ownership of its own content management. Once the Region's new website platform is implemented in 2024, staff are recommended to explore an expanded knowledge base solution including self-serve and connectivity to a full chat bot / online chat function.

Operational savings and efficiencies:

Significant efficiencies were achieved with the implementation of the current knowledge base software in Phase 1 (2021). With the recommended process changes as well as extending the software to all departments with a public facing function there will likely be further incremental efficiencies. At this point, without the supporting data it is impossible to quantify the operations savings.

Other benefits:

- *Visibility across the Region and knowledge preservation:*
  With employee turnover prevalent across all business sectors, loss of organizational knowledge is a significant business risk. A properly populated and maintained knowledge base requires that staff regularly update it ensuring accuracy and consistency for use across the organization.

- *One source of truth - consistency:*
  A knowledge base provides one source of truth that all teams and departments can access across multiple channels of communication. Result is a more consistent and unified customer experience.

- *Integration:*
  Some knowledge base software has a *CRM application* or can easily integrate with a CRM. This option could allow for an online portal that could coincide with

the customer facing knowledge base. Clients could create an account, submit a ticket (or question) and track the responses. This could be expanded further to allow residents to manage information, complete/edit applications and make online payments.

iii. Chat Bot / Live Chat Software

A chat bot with live chat software would allow for real time communication between staff and website visitors via chat windows. The chat bot can answer questions, support requests and/or direct the customer to the website or a live agent for further assistance. Typical features include reporting and analytics, interactive chat notifications, and conversation archiving.

Available 24/7 with AI assisted technology, the addition of live chat to the Region's website is the single most impactful change towards modernizing customer experience and moving to anywhere/anytime service. Initially, the automated chat bot function would likely be somewhat limited as full implementation is tied to other initiatives and improvements in Year 2 and 3 (knowledge base, web platform, and self-serve web function).

Operational savings and efficiencies:

Although implementing the live chat function will reduce staff effort for telephone calls and in person inquiries, this will likely be replaced by service requests via chat including those not easily answered by an automated chat bot message or for customers requesting a more personalized experience. Once fully implemented, a chat bot as a self-serve option will reduce the number of customer service inquiries. At this point in time, without supporting data and the fact that usability of the chat bot is fully dependent on the implementation, it is impossible to effectively quantify the savings.

Other benefits:

- *Always available:*
  In today's world, particularly post pandemic, customers expect any time anywhere service. With a chat bot in place, maintaining a 24/7 response is possible with live support agents during business hours, and a chat bot with AI technology programmed to answer clients questions based on their keywords.

- *Multilingual:*

Chat bots and online chat can be programmed to carry out conversations in multiple languages eliminating the need for a staff-initiated translation through fee-for-service outside provider. The latter is somewhat cumbersome and depending on volume of use, can be expensive.

- *Collaboration:*
  Chat bots are able to record customer interaction for accuracy and archiving. They can be connected to a ticketing system or have an embedded ticketing system and if the customer is transferred to a live agent, the full chat history is available.

- *One source of truth:*
  Directly connected to a knowledge base, chat bots provide one source of truth minimizing the possibility of inconsistent or incorrect answers.

- *Scalability:*
  While a customer representative deals with one customer at a time, a chat bot can answer thousands of questions simultaneously.

- *Customer Satisfaction Survey:*
  Once a chat has been completed, a simple survey can be given to the client for them to express their satisfaction with the service provided.

- *Integration:*
  For the chat bot to provide accurate and consistent answers it needs to be connected to a *knowledge base.* This can be an organization's website, a knowledge base application or built into the chat bot.

iv. Visitor Management Software

Visitor management software electronically monitors and records information about visitors making sign-in process more efficient, accurate, and consistent. The software documents information about purpose, length of visit and the visitor's whereabouts in the facility. When implemented at Region Headquarters, a visitor can register upon arrival at the Customer Service kiosk or use the self-serve option and register online (prior to the visit) or at a self-serve kiosk at Headquarters. The software can also include a screening function against red flag lists, increasing building security protecting other visitors and employees. Software can provide customer profile creation and management to provide analytics on visits, service provided and red flags related to potential security threats or issue management.

Operational savings and efficiencies:

Reducing staff effort while also reducing time spent by the customer will result in operational savings and efficiencies while also gathering more information. Depending on the level of automation and the self-service functionality, the visitor check-in process could take less than 20 seconds (service provider website) including communication to internal staff, visitor badge generation in accordance to Access Control Policy, and collection of visitor information for data collection and security purposes.

Although there is currently no data available on visitor check in time, anecdotally, the assumption is that the manual system takes between 1 to 3 minutes to complete visitor sign in. If we assume a fully automated check in process with 25 to 50% uptake in use, and based on current walk-in visitor levels of an average of 60 to 100 interactions per day, moving to visitor management software could save up to 150 minutes per day in staff time (at the high end).

Other benefits:

- *Streamlined process:*
  Paper sign-in logbooks and long reception desk lines are poor customer experiences. Visitor management software digitizes this process and provides a streamlined visitor experience with increased functionality for staff with instant notification of visitor arrival, customizable sign-in and early registration.

- *Confidentiality:*
  Confidentiality on who and why someone is visiting an organization is critical in order to protect visitor privacy as well as business processes. Visitor management software stores information in a secure database (administrator and password protected) with no outside visibility.

- *Better Data Collection & Reporting:*
  Analysing data from manual logbooks requires time and effort and is easily subject to human error. Visitor management software allows for easy data export, or analysis within the software on visitor volume, reason for visit, length of visit, etc.

- *Provide a Safe Workplace:*
  The implementation of Visitor Management software at Region Headquarters will increase physical security as well as engender confidence that visitors and staff

are safe while also keeping criminals wary to attend. Depending on its functionality, it may include various active and passive security measures:

- Red Flag List: can screen visitor against internal red flag lists
- Access Control Integration: can work directly with access control software limiting access to only those who are authorized or during a certain time.
- Accuracy in Emergencies: visitor management system can report on who is in the building making it easier for staff and first responders to clear the building.
- Watch-List Referencing: able to compare to government watch lists after a visitor's government-issued ID is scanned and alert customer service representative should it be necessary.

v. Room and Event Booking System:

Effective visitor management includes a function for room and event booking. Internal meeting rooms and International Plaza (Regional Headquarters) are available for use by external clients according to the Room Booking and Event Policy and procedure. Variables such as security, janitorial and staffing requirements for room or event bookings will need to be captured via software for consistent application of the policy. Consistent application of fees as per the Fees Bylaw will also be managed through this administrative process. Online payment options should be explored to increase ease of use and convenience for customer.

Room booking software will also provide for collection of data, analytics and customer information allowing for data driven decisions related to use of space and organizational needs.

Operational savings and efficiencies:

Operational benefits of using a room and event booking systems are evident (and listed below). As this will be a new service, there is no data available to determine cost savings (largely due to streamlined process).

Other benefits:

- *Better Data Collection & Reporting:*
  A Room Booking and Event software system allows for easy data export, or analysis within the software on usage volume, customer information collection for

profile building and feedback collection as well as scheduling functions for booking purposes.

- *Streamlined process:*
  A consistent application of Room and Event booking system allows for accuracy and consistently for booking purposes. Customer Services are the main contact for such requests and all inquiries and requests funnel through the same channel for ease and efficiency.

- *Provide a Safe Workplace:*
  Refer to Visitor Management software listed above.

vi. Online Payments

Online payments are commonplace and available for most first tier services that consumers require. Ability to purchase services or pay fees online increases availability and ease of service to customers.

Other benefits:

- *Anytime, anywhere approach:*
  Availability of all types of payments makes it easy for customers to seek options online.

- *Digital Modernization:*
  Customer expect to receive services in multiple ways, including making one-time payments online for first tier services.

vii. Customer Feedback Process:

Although there will be some level of customer feedback functionality included in the other Year 1 improvements, these are bi-products of the software and will not provide effective customer feedback process. A formal Customer Feedback Process is required to define best practices for feedback collection, analytics and use. I will also inform the Corporate Customer Service Policy to be developed in Year 2:

- WHO are we soliciting feedback from?

- WHAT type of information are we collecting from the customer (name, telephone, email or other demographic information etc)?
- WHERE and how is the feedback being collected – at the source of the service, follow up after service via digital connection through email or phone, etc?
- WHEN are we soliciting feedback?
- WHY has there been a change to service we want to measure, etc?

Year 2 (2024) – Analysis and Metrics

Following the implementation of Foundational Software and Processes in Year 1, it is recommended that the Customer Service team transition to measurement and analysis of previous years improvements along with working with IT on implementing the website platform and the telephone system upgrade.

viii. Data Collection and Analysis

Much of Year 2 will be spent in data collection and analysis in order to:

- Quantify savings and efficiencies from previous year
- Establish metrics and levels of service
- Developing a service dashboard
- Finalize policies and procedures

As part of the data collection and analysis, Year 2 will include establishment of best practices on how Customer Services reports data to internal departments / divisions. It is critical to understand what data is considered valuable – what is relevant, important and meaningful data – in order to improve service levels. This will also inform a customer dashboard measuring levels of service.

ix. Telephone System Upgrade

As indicated in Section 2 Customer Services Working Group and other Synergies, the Region's telephone system and call centre technology has reached end of life and is no longer supportable. IT will be tendering this scope in Spring 2023 with go live date late in 2023. Once implemented, the updated system will provide increased functionality with respect to user interface, reporting, analytics and call centre functionality with the intention of modernizing the system.

x. Web Platform

As indicated in Section 2, IT is leading a Web Content Management Platform review with project award in spring 2023 and go live date late 2023. Through this Web project, many of the functions identified as gaps in the analysis portion of this report will be addressed in relation to advanced functions on the web (for example, a self-serve option).

Year 3 (2025) - Digital Improvements

Although modernizing digital services is a key component of improving the customer experience at the Region, some of the digital improvements are delayed to Year 3 in order to secure resources and to achieve better synergies with:

- *Levels of Service:*
  As part of determining levels of service in 2024, a detailed survey of web traffic will be undertaken to determine how best to streamline the process and what types of inquiries should be directed to the Customer Services team.

- *Web Platform:*
  The implementation of the Region's new website platform is scheduled for late 2023. During 2024, the Customer Service team will be working with other stakeholders to maximize improvements to digital services in 2025 across all functions at the Region.

- *Building on 2023 and 2024:*
  Re-examine the Knowledge Base and the Chat Bot / Online Chat software solutions to realize full benefits.

- *The Right Size Solution:*
  Similar to building on 2023 and 2024, the right size solution speaks to leveraging all the previous work to determine if gaps remain still remain with respect to CRM software or with extending hours of operations. Or, do all the recommended tools and solutions combine to fill the two gaps.

xi. Self-Service Option

- *Expand the Knowledge Base Function:*

Recommend implementation of an expanded Knowledge Base solution with full web functionality and connection to Chat Bot software purchased in 2023. This will allow for a full self-service through web providing the public with ease of access to accurate information and anywhere any time service.

- *Maximize the Chat Bot Function:*
  With a new web platform and a new knowledge base, maximize the Chat Bot function from the software solution implemented in 2023.

xii. General Contact Forms

Currently web inquiries via General Contact Forms are managed by the Region Communications team with questions or comments being redirected to other departments as required. As discussed in the previous section, there is no tracking mechanism and no means to ensure consistent service or answers across the different applications or the different departments.

With other solutions and systems in place, the Consultant recommends that General Contact Forms on the Region's website be redirected to the Customer Services team allowing for tracking, consistency in service and anywhere anytime serve.

xiii. Remove Personal Contact Information

Although simple to execute, it is recommended that the removal of personal (business) contract information from the Region's webpages be delayed until the contact form process is put in place. This will allow for triaging, directing to appropriate staff and tracking the request.

xiv. Social Media Direct Messaging (DM)

Social media direct messages are received from various applications such as Facebook, Instagram, Twitter and YouTube. Inquires to those accounts are managed by Strategic Communications and Public Affairs staff in collaboration with operating divisions to respond to inquires and comments. Because of the potential for sensitive topics or misdirection available on this type of public platform, the Consultant recommends that social media direct messages continue to be managed by the Communications and PA teams. Expansion of the knowledge base and use of a ticketing system will support consistency in information provided.

5. Synergies and Partnerships:

As Region staff implement the solutions from Years 1 and 2, the Customer Services team will continue to seek synergies across the different departments and programs and explore options of integrating additional First tier services. Increased means for communicating and serving Region customers, data and analytics, data driven decisions as well as increased knowledge sharing will further strengthen the organization departments with the shared goal of quality service to customers.

In April 2018, the Niagara Customer Service Network was established with the goal of enabling collaboration between the Region, local area municipalities and public sector partners. Although on hold for three years due to the pandemic, the Region will be seeking to re-establish the initiative in early 2023 with the express goal of exploring opportunities for some integration of services to better serve Niagara residents.