

Staff Report



To	City Council
Service Area	Corporate Services
Date	Tuesday, December 13, 2022
Subject	Implementing Service Simplified: Guelph's Customer Service Strategy

Recommendation

1. That the report titled Implementing Service Simplified: Guelph's Customer Service Strategy - 2022-374, dated December 13, 2022, be received.
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Executive Summary

Purpose of Report

This Report provides City Council and the community with an update on:

- The progress of implementing [Service Simplified](#): Guelph's customer service strategy,
- A related [CAO 2022 performance objective](#): Oversee the continued development of a customer and digital services/experience focus. Measured reportable outcomes and efficiencies, including the plan to implement a comprehensive/intelligent customer service interface within 2 years, to be provided to Council by the end of 2022 and regularly thereafter.

Key Findings

Implementation of Guelph's four-year customer service strategy, [Service Simplified](#) was initially approved in 2018 and restarted in 2022.

Year one accomplishments 2022

- Developing and implementing Guelph's Good Service Standards and employee training
- Developed standardized customer satisfaction measurement policy and procedure
- Added new and improved digital services (Report a Problem Map)
- Began centralizing customer service functions (ServiceGuelph Solid Waste).

Looking ahead 2023-2025

With customer service standards and measures in place, the next few years are focused on improving customer service processes, tools and technology.

The City is already working to offer more frontline services from a central customer contact centre. Ultimately, a central customer contact centre can include:

- A team of service agents acting as the first contact for the City’s public-facing services – one phone number, one email address, chat etc.
- Members of the team working from several locations while providing service by phone, email, web, social media, live chat, or in-person.
- The team would use standardized information to **resolve 50-60% of customer inquiries during the first interaction**. First contact resolution may vary by department based on the complexity of the service.
- Service-focused website and digital customer service platform (CRM), with online self-serve options available 24 hours a day.
- Members of the team would be available by phone, email and in person for up to 12 hours a day. NOTE: any changes to work hours must be planned and communicated in accordance with collective agreements.
- Continue using external contracted agencies for phone service to support critical /on-call service after office hours.

CAO performance objective

The City is working to become a more customer-focused, performance-driven and digitally-enabled organization. The Guelph Service Standards and Customer satisfaction allow the City to set meaningful targets and report on performance.

Interdepartmental teams are doing the necessary work to prepare for a digital customer service interface (service-focused website and integrated customer relationship management platform) however, implementation of such a platform can only be completed once this preliminary work is finished.

Before implementing a customer service interface, the City must centralize its customer service delivery model, and build foundational IT infrastructure to support a digital service platform (customer data management and integration platform).

The City also has several other critical customer service projects underway including:

- Improving the City’s development application process/platform
- Replacing the City’s property tax management platform
- Replacing the City’s work order/asset management and purchasing platform

Given these critical priorities for the organization, and customers, the City plans to purchase a CRM in 2024 and implement a digital customer service platform from 2024-2026.

Strategic Plan Alignment

This work directly supports the City of Guelph’s vision, mission, and specifically the corporate value of [Service: community-driven](#).

It aligns and supports Guelph. Future-ready. Specifically, [Working together for our future](#) pillar to improve how the City communicates and delivers services.

- Improving services through greater use of technology and data
- Accelerating digital delivery of services
- Improving front-line customer service and communications

This work also supports the [Council-approved customer service strategy: Service Simplified](#) and related [CAO performance objectives](#) and working to become a more customer-focused, performance-driven and digitally-enabled organization.

Financial Implications

The City's investment in Guelph's customer service and experience program is starting to deliver tangible results. With a full-time Program Manager in place, and a Business Analyst joining the team in 2023, the City can continue implementing customer and digital service improvement projects, including but not limited to a central customer contact centre, customer data management, work order management and, eventually, a digital customer service platform (CRM).

A detailed multi-year capital and operating budget proposal will be presented to Council for consideration as part of the proposed 2024-2027 multi-year budget to support further implementation of the City's customer service strategy and related initiatives including but not limited to a central customer contact centre, customer/user research, continuous improvement, website and telephony improvements, digital customer service platform (CRM), and ongoing employee training.

Report

The City's four-year customer service strategy, Service Simplified, was initially approved by City Council in 2018, paused due to competing budget priorities, and restarted in 2022.

While resuming the implementation of the strategy, the City engaged employees throughout the organization to update its vision for customer service:

"To increase trust in City government through good customer service and experiences."

Year one accomplishments

Guelph's Good Service Standards

Using research from the [Institute for Citizen-centred Service](#), and input from more than 100 employees and leaders, the City established Guelph's Good Service Standards including:

- commitments to coworkers
- commitments to customers
- drivers of good service (timely, easy and accessible, accurate and reliable, fair and equitable, personal and friendly)
- standard response times for service provided in person, by phone, by email and online

This year, 150 employees participated in customer service training to ensure employees understand the drivers of good service and expectations set out in Guelph's Good Service Standards.

Corporate customer service training will be offered at least annually to ensure all current and new employees understand their role and responsibility to meet Guelph's Good Service Standards.

Standardized customer satisfaction measurement

The City completed on a LEAN continuous improvement project to develop a standardized approach to measure and report on customer satisfaction with public-facing services. The Customer Satisfaction Measurement Policy and Procedure are aligned with Guelph's Good Service Standards, and the City has started using these measures to evaluate customer satisfaction with 27 services delivered at ServiceGuelph.

Over the next year, the City will apply standard customer satisfaction measures for all public-facing services. The results will be included in the 2023 Guelph. Future-ready progress report.

New and improved digital services (Report a Problem Map)

This year, the City added 22 new services to the digital [Report a Problem Map](#).

The map allows people to report concerns about parking, potholes, park maintenance, illegal dumping and more.

A total of 67 of Guelph's most popular services are available. The map works on desktop and mobile devices—**no app required**.

The map is our best online example of a "One City" approach to customer service, it is a big step in the right direction. Seven departments receive and resolve service requests from the Report a Problem map.

The lessons learned from operating the map will inform future decisions about service design, delivery and technology solutions.

Working toward a "One City" approach to customer service

Fewer routes into the City for customers means better measurement and management of service quality.

The ServiceGuelph counter represents a logical first step to consolidate front-line services in-person, by telephone, and email.

In 2022, the City completed a LEAN continuous improvement project to learn how a more centralized approach could improve experiences for customers and reduce unnecessary phone calls to Guelph's solid waste services department.

ServiceGuelph is now the first point of contact for customer phone calls about solid waste services. About 35-45% of those calls are resolved during the first interaction. Customers said they spent less time waiting on the phone, and employees in solid waste services have about 2.5 hours a week to focus on more complex customer interactions, and other projects.

The project also showed that, with better technology and tools, ServiceGuelph could resolve more types of customer inquiries by phone or email. These lessons will be applied as the City continues centralizing frontline customer service functions.

Looking ahead

Planning a central contact centre and digital customer service platform

The City believes it can:

- Establish a customer service delivery model that users and elected officials can trust, allowing senior leaders and members of Council to focus on strategic decisions and direction for the community
- Reduce the number of unnecessary inquiries by using clear, plain language in all City communications
- Reduce the number of unnecessary calls by improving website content and usability (increasing self-serve options)
- Use data about current inquiries and transactions to find opportunities for improvement and offer more self-serve options online
- Train and empower service agents to resolve more types of interactions without involving technical staff/subject matter experts (improve service quality, reduce hand-offs, reduce service cost and back-office interruptions)
- Reduce customer frustration related to the number of unanswered, and voicemail-terminated calls

Goals and objectives

- Increase trust in government through good service experiences
- Reduce process waste (misdirected calls/emails, wait times, duplication among departments etc.)
- Reduce cost per transaction (once standardized operations and supporting technology are in place, self-service options are less costly to operate)

Strategies

Treat this significant organizational change like any large-scale, multi-year infrastructure project:

- Assign a dedicated team with the required skills to lead the transformation (customer service and experience, change management, business process management, continuous improvement, service design, web, data, digital, labour relations, communications etc.)
- Assess the current state (customer service processes, staffing and tools at all departmental service desks)
- Consider ways to streamline and improve customer experiences
- Assess and mitigate risks (service delivery, employee relations, public, reputation, financial, regulatory)
- Inform and engage internal and external stakeholders of planned changes
- Plan the transition in phases to minimize service disruption
- Retire and replace Guelph's customer service infrastructure (internal and external technology and tools)

Establish a central customer contact centre before attempting to implement new corporate customer service tools or technology (e.g. 311, CRM).

- Use current customer behaviour and other 311-style municipal customer contact centres to establish the initial scope of services offered
- Increase services provided by ServiceGuelph; a logical first step to centralize front-line services in person, by phone, email and online
- Improve the measurement and management of service quality
- Apply the expertise of frontline service agents and professional staff more appropriately and cost-effectively

Improve and centralize services in waves; start with departments most prepared to change (documented service processes, employee capacity, commitment, collaborative culture, etc.)

- Focus on service improvement, not just consolidation or digitization
- Ensure any changes to customer service processes, procedures, job descriptions and/or work hours are planned and communicated in accordance with collective agreements
- Train and empower service agents to resolve more types of interactions without involving technical staff/subject matter experts (improve service quality, reduce hand-offs, reduce service cost and back-office interruptions)

Start implementing a customer-focused data management program built in connection with an enhanced application integration platform; foundational IT system work required to choose and implement a CRM.

- Clearly define expectations and user test cases of customer data management including customer identity and interaction management
- Build and implement data warehousing strategy to support key data / content sources required by central contact centre; data specialist position delayed due to difficult recruitment environment
- Implement a new integration platform to support a CRM as the city shifts towards more modular products and away from large on-premise applications; an integration specialist is included in the approved 2023 budget.

Outputs and Outcomes

Fewer phone lines, less confusion

As each service joins the central customer contact centre, the city will:

- redirect and reduce the number of direct dial phone lines
- remove direct dial numbers from web pages, ads, and other promotional materials

Website content improvements

As each service joins the central customer contact centre, the City will:

- Review and improve existing web content to make it easier to find, understand and use.
- Establish interim roles and responsibilities to maintain accurate web content.
- Offer online options for customers to submit requests for service (processing the request through CRM and back-office systems where possible)

A full website redesign has been recommended in the City's [Digital Technology Master Plan](#), and Guelph's [One City. One Voice. Shared Purpose. Strategic Communications and Community Engagement Plan](#) and would be subject to future budget approval.

Digital Customer Service Platform (CRM)

Based on experiences in other municipalities, advice from external consultants, and lessons learned from the City's own experiences, the City does not recommend investing in a CRM without a centralized approach to customer service; providing more services through a central customer contact centre.

With a customer contact centre established, and customer data management, integration platform and data warehousing in place, the City can choose and purchase a CRM to support customer service interactions in person, by phone, by email, and chat etc. and begin integrating the system with the City's website and back-office systems (work order management, registrations, applications, payments etc.). This ongoing program of work requires maintenance and oversight.

Most large organizations and many municipal governments have a central customer contact centre, and that contact centre uses a CRM to:

- Manage a central database of customer information
- Receive and resolve customer inquiries
- Track and report on service efficiency
- Engage and inform customers of new or different programs and services
- Inform customers about service disruptions
- Understand customer behaviour, anticipate issues and find opportunities for improvement
- Develop self-serve options and automate service process

"Citizen Engagement Becomes Easier and More Accessible

... CRM platforms are incredibly useful in helping government agencies to connect with their citizens.

They do this in a number of ways. More citizens are looking for self-service portals and utility apps — such as 311 apps or traffic apps — that help them connect to their local and state governments with questions and requests. Furthermore, CRM platforms help agencies to quickly and easily create and customize their own apps, allowing for fully personalized citizen portals.

Aside from self-service portals, government agencies can also use CRM platforms to better serve citizens using case management tools. These kinds of tools will allow employees to resolve cases faster through automatic categorization and instant access to relevant information. Once again, analytics provide smart insights that also help to solve problems before they arise."

Source: [How CRM Can Help Bring Government Technology Into the 21st Century](#)

A central customer contact centre and fully integrated digital customer service platform

Ultimately, after centralizing the City's primary customer service function, the City can have:

- A team of service agents acting as the first contact for the City’s public-facing services – one phone number, one email address, chat etc.
- Members of the team working from several locations while providing service by phone, email, social media, live chat, or in-person.
- The team would use standardized information to **resolve 50-60% of customer inquiries during the first interaction**. First contact resolution may vary by department based on the complexity of the service.
- Service-focused website and digital customer service platform; self-serve options available 24-hours a day.
- Members of the team would be available by phone, email and in person for up to 12 hours a day. NOTE: any changes to work hours must be planned in accordance with collective agreements.
- Continue using contracted phone service to support critical /on-call service after office hours.

Implementation

Based on expert advice and experiences of other municipal customer service teams that have completed digital service transformation projects, the City believes the fastest and most sustainable approach is to improve and centralize services in waves starting with departments most prepared to change (documented service processes, employee capacity, commitment, collaborative culture etc.)

See attachment 1: Proposed Implementation schedule 2023-2025

The proposed schedule relies on each wave of work having a dedicated project team (customer service and experience, change management, business process management, continuous improvement, web, data, digital, labour relations, communications etc.). Each wave will take about 5-6 months. The schedule is subject to change based on the complexity of services and staff capacity.

Using current customer behaviour and other 311-style municipal customer contact centres to establish the initial scope of services offered, a central customer contact centre could act as the first point of contact for the City’s most popular services. A central customer contact centre can be complete over the next five years.

Financial Implications

The City’s investment in Guelph’s customer service and experience program is starting to deliver tangible results. With a full-time Program Manager in place, and a Business Analyst joining the team in 2023, the City can continue implementing customer and digital service improvement projects, including but not limited to a central customer contact centre, customer data management, work order management and, eventually, a digital customer service platform (CRM).

This work must be scheduled alongside several other critical customer-service projects underway including:

- Improving the City’s development application process/platform
- Replacing the City’s property tax management platform
- Replacing the City’s work order/asset management and purchasing platform

Each of these high-priority technology projects requires a team with specialized skills and technical expertise. Attracting and retaining employees with the necessary skills has become increasingly difficult in today's labour market, and project implementation schedules are likely to be affected.

A detailed multi-year capital and operating budget proposal will be presented to Council for consideration as part of the proposed 2024-2027 multi-year budget to support further implementation of the City's customer service strategy and related initiatives including but not limited to a central customer contact centre, customer/user research, continuous improvement, website and telephony improvements, digital customer service platform (CRM), and ongoing employee training.

Consultations

This report was shared with the City's Human Resources, Information Technology, Finance, and Strategic Communications and Community Engagement teams before it was shared with City Council.

Employee consultation and engagement are already underway, and a city-wide change management and communications plan will be developed to support employees and leaders through this significant, multi-year organizational change.

Customer satisfaction measures and user research will be used to improve services offered in a central customer contact centre. The City will begin regular reporting of customer satisfaction measures in the 2023 Guelph. Future-ready. progress report.

Attachments

Attachment 1- Proposed implementation schedule 2022-2025

Attachment 2- Presentation – Implementing Service Simplified 2022

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