



# BLACKLINE CONSULTING

A Higher Standard

## Customer Experience Strategy

### Findings and Recommendations







#### City of Brantford

16<sup>th</sup> March 2023

DRAFT FOR DISCUSSION

PRIVATE AND CONFIDENTIAL

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/ CONTEXT

# The City is seeking to develop its next customer service strategy

**The City of Brantford engaged Blackline to create a new customer experience strategy to replace its previous “Customer One” strategy that it implemented starting in 2013**

Since then, the City has embarked on numerous initiatives to improve customer service, including the 2017 formation of the Corporate Contact Centre (CSC) and the implementation of a Customer Relationship Management system (Lagan).

- ▶ Having achieved most of the objectives of that first strategy, the City now wishes to consider how it should evolve customer service in the coming years to best match resident needs and expectations. This project aims to build the foundation to create a new Customer Experience Strategy that aligns with its customers' ever-changing needs and expectations.

## Scope

The two key areas of focus are:



### Customer Experience Strategy

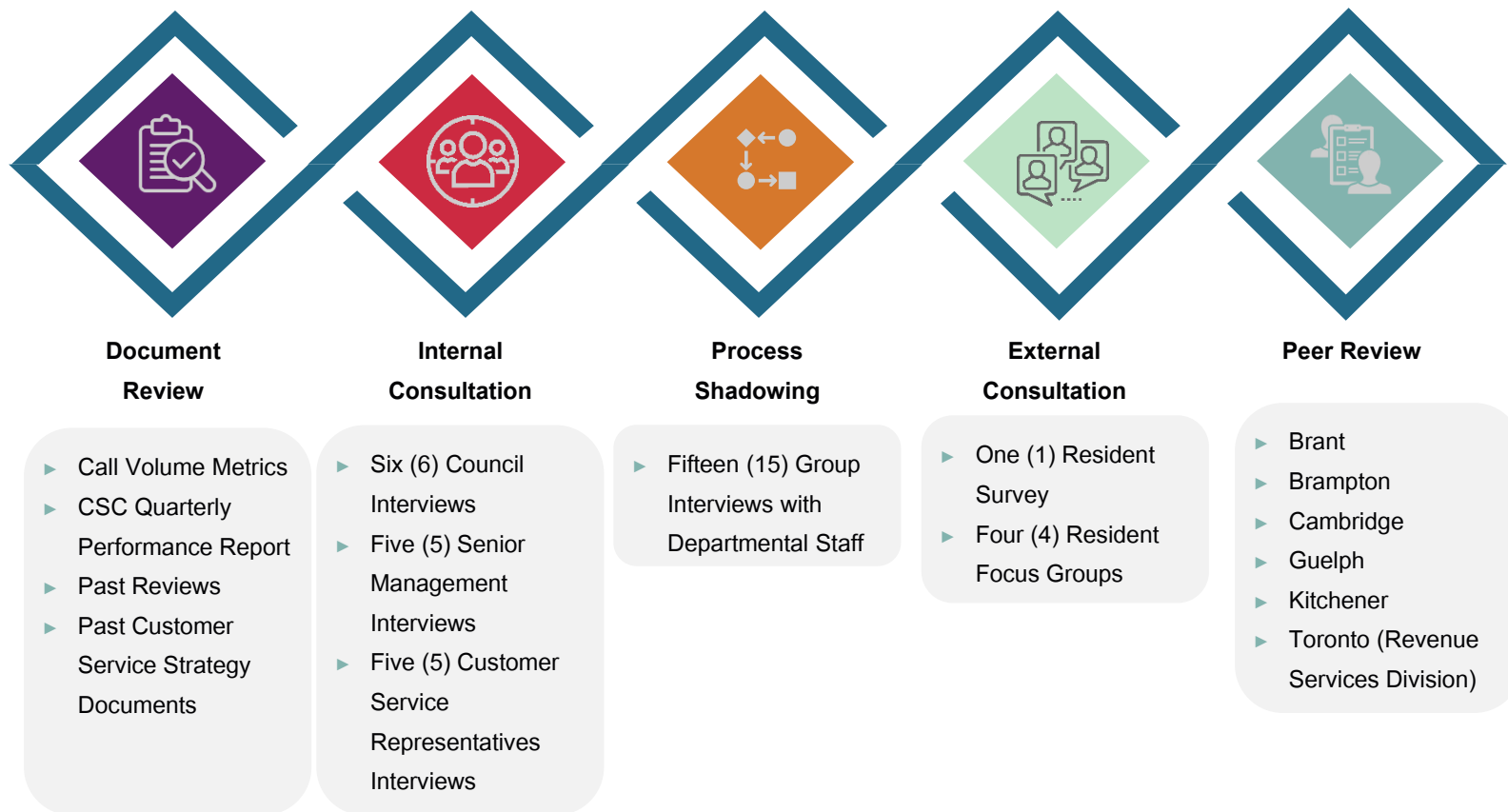
- ▶ Engage the community and internal stakeholders
- ▶ Conduct an environmental scan
- ▶ Develop a Customer Code of Conduct
- ▶ Review and enhance the City's current Customer Service Standard and Corporate Customer Handling Complaints Policy
- ▶ Define a streamlined process for Council inquiries



### Continuous Improvement and Performance Measurement

- ▶ Review current customer service practices and data
- ▶ Provide gap analysis and roadmap to improve service delivery.
- ▶ Recommend improvements to customer service processes, performance measures, service offerings and branding

# We based our analysis on data gathered through a variety of sources



# To structure our review, we applied our customer service framework

## We used a process framework as a basis for our review

We then met with the project lead to refine and tailor the process so that it more closely aligns with the City's activities.

	Develop customer care/customer service strategy			Plan and manage customer service operations			Measure and evaluate customer service operations		
Process	1.0 Develop customer service segmentation/ prioritization	2.0 Define customer service policies and procedures	3.0 Establish service levels for customers	4.0 Plan and manage customer service work force	5.0 Manage customer service requests/inquiries	6.0 Manage customer complaints	7.0 Measure customer satisfaction with representatives	8.0 Measure customer satisfaction with complaint resolution	9.0 Measure customer satisfaction with products and services
Sub-Process	1.1 Analyze existing customers	2.1 Define customer service	3.1 Analyze existing service data	4.1 Forecast volume of customer service contacts	5.1 Receive customer requests/inquiries	6.1 Receive customer complaints	7.1 Gather and solicit customer feedback on inquiry handling	8.1 Solicit customer feedback on complaint handling and resolution	9.1 Gather and solicit post-sale customer feedback on products and services
	1.2 Analyze feedback of customer's needs	2.2 Create CS Policy	3.2 Develop baseline	4.2 Schedule customer service work force	5.2 Route customer requests/inquiries	6.2 Route customer complaints	7.2 Analyze inquiry handling satisfaction data and identify improvement	8.2 Analyze customer complaint data and identify improvement opportunities	9.2 Solicit post-sale customer feedback on ad effectiveness
		2.3 Define supporting operational procedures	3.3 Develop service levels	4.3 Track work force utilization	5.3 Respond to customer requests/inquiries	6.3 Resolve customer complaints	7.3 Provide customer feedback to customer service management		9.3 Analyze product and service satisfaction data, identify improvements
		2.4 Train staff and communicate policy to customers		4.4 Monitor and evaluate quality of customer interactions		6.4 Respond to customer complaints			9.4 Provide customer feedback to product management



A high-angle, slightly blurred photograph of a large, dense crowd of people walking. The individuals are dressed in casual to business-casual attire, including shirts, sweaters, and jackets. The crowd is moving in various directions, creating a sense of dynamic activity. The background is out of focus, emphasizing the sheer number of people in the foreground and middle ground. The overall tone is busy and overwhelming, visually representing the concept of high customer service demand.

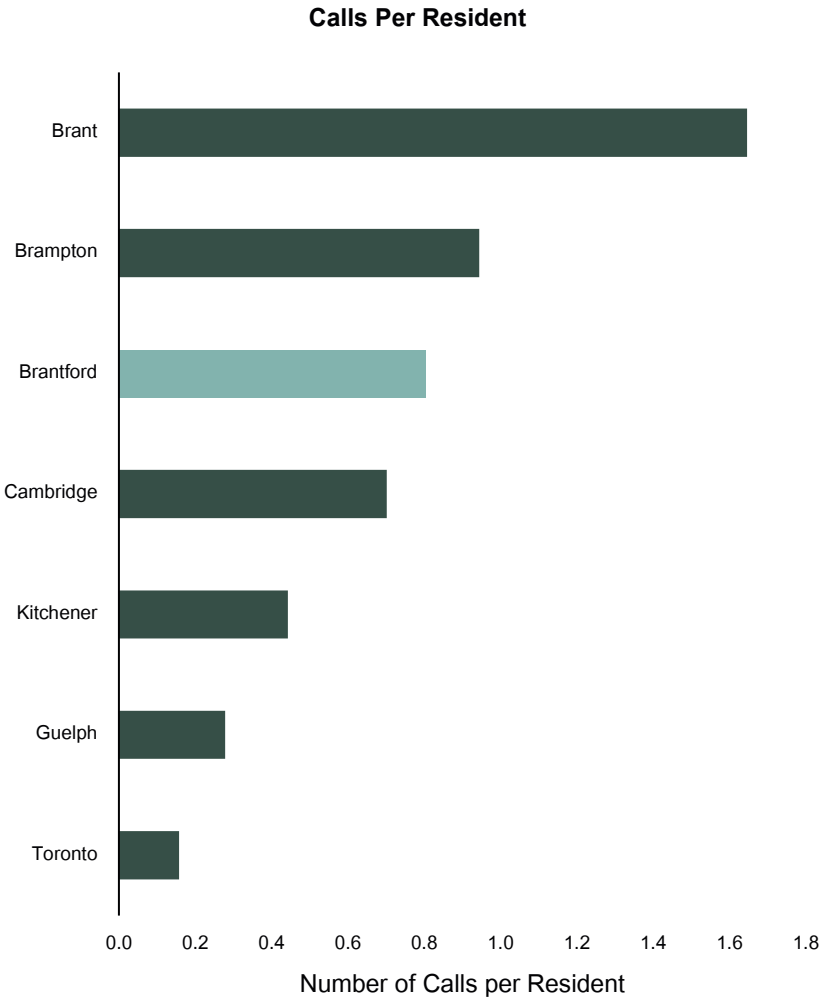
**/ CUSTOMER SERVICE DEMAND**

# Brantford tends to receive more contacts than surrounding peers

## The number of calls per resident varied between the municipalities

However, this change in call volume was not related to population. One might expect that calls per resident would fall as the population rose, but population doesn't appear to be the determining factor, as seen in the chart to the right.

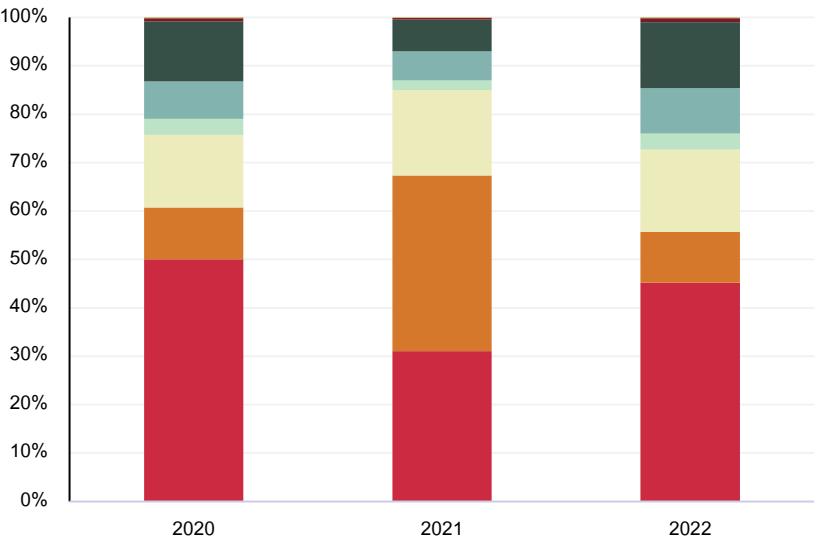
- ▶ Brantford tends to get more calls per resident than its peers. While the data from peers cannot tell us conclusively why this is, possible reasons include Brantford having:
  - Fewer online services
  - Less, or more difficult to find, information on its website
  - More people following up on the status of inquiries/requests
- ▶ This last possibility could relate to the level of outbound communication on status or to the service standard, i.e. residents are more likely to call back if it takes a long time to address the initial request.





# The Customer Service Centre handles an average of 39,000 tickets per year

CSC Ticket Volume by Department



- Fire
- Community Engagement & Customer Services
- Economic Development & Tourism
- NA
- Gov. Relations & Corporate Initiatives
- Community Services & Social Development
- People, Legislated Services & Planning
- Finance
- Public Works

**With the multiple entry points for customers, we cannot give a picture of total demand, however, we are able to look at data that relates to the Customer Service Centre (CSC)**

Ticket volume has remained largely constant from 2020-2022, averaging about 39,000 tickets per year.

- ▶ The number of inquiries in 2020 and 2022 is similar, with 6% fewer calls in 2022. This trend was consistent across most departments.
- ▶ The Public Works commission consistently receives the highest volume of tickets. The People, Legislated Services and Planning commission followed but with significantly fewer tickets.
- ▶ The Economic Development and Tourism department saw a slight increase in the volume in 2022, however, the overall quantity was still quite low when compared to the other departments. These tickets were all information requests.

Overall indications suggest that the City should expect demand to continue at current levels.

# 2021 saw a temporary spike in volume attributed to two events

**While underlying demand remains flat, Finance and People, Legislated Services and Planning (PLSP) saw large rises in volume in 2021**

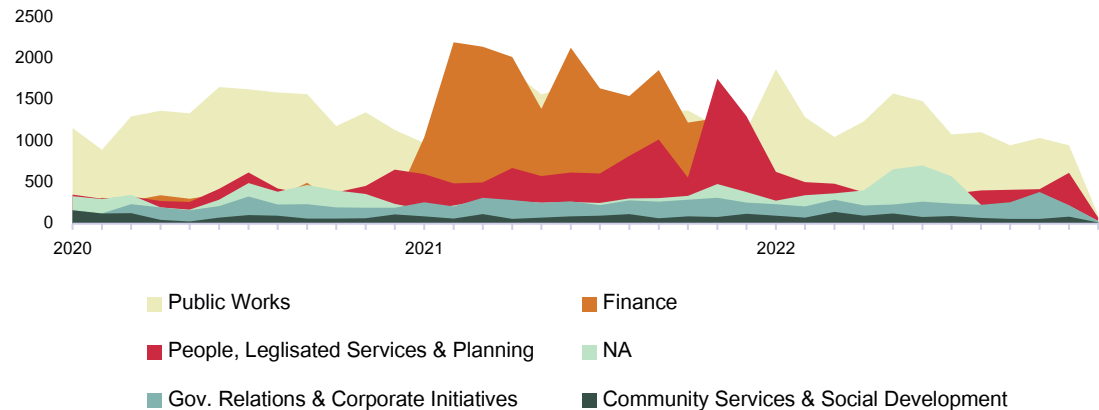
The chart to the right shows Finance volume in orange and PLSP in red.

- ▶ Once we dig further into the data – paying property taxes singly accounted for the observed spike in 2021, shown in green on the lower chart. This may have been reflective of a change in rates, thus resulting in a higher number of inquiries.
- ▶ The spike in PLSP tickets is almost entirely related to dog licenses. We understand that the City changed its fees in 2021 and residents rushed to get their applications in prior to the end of the year.

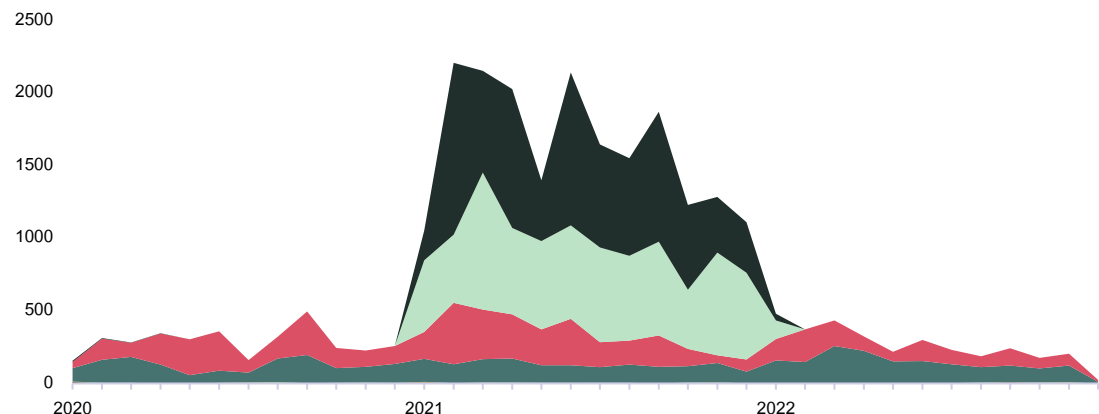
**This analysis highlights the effect on customer demand as the City makes changes to policy**

- ▶ The staffing model at the moment in the CSC has little flexibility to scale to address changes in demand of this nature, which means the current staff complement had to handle this material increase.

**2021 Saw Two Spikes In Contact Volume**



**Paying Taxes Accounted for the Increase in Contacts in 2021**



# CSC categorized 60% of tickets as informational

**The majority of contacts related to residents seeking information rather than making a service request**

Information requests are a key area the City could act upon to reduce contacts. The better information that is available from other sources, the fewer contacts to the City.

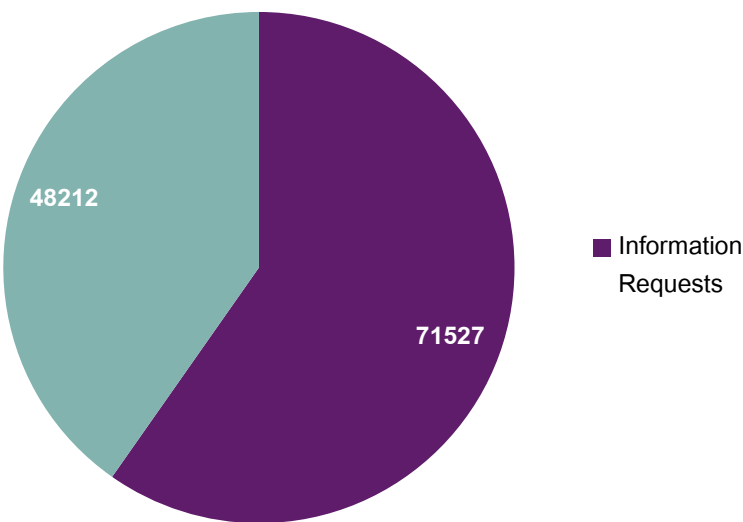
- ▶ Almost half of all informational tickets are related to Public Works. Most inquiries were related to Scheduled Pickups, Curbside Pickups, Missed Garbage Collection and Waste Dropoff. These are all categorized under the division of Environmental Services.

**Some of the peers are working towards increasing the amount of departmental knowledge that is readily available to customers**

This seems to be a journey that starts with the Customer Service team maintaining an up-to-date record of departmental information.

- ▶ Once this knowledge base is matured, peers seem to then start to think about how to make much of this information available to residents directly.
- ▶ Creating separate knowledge bases, one in the department, one for customer service and one for the resident, creates an unmanageable overhead.

Type of Request as per CRM Tickets (2019 – 2022)



# Focusing on the root cause of a small number of request types could materially reduce the number of contacts

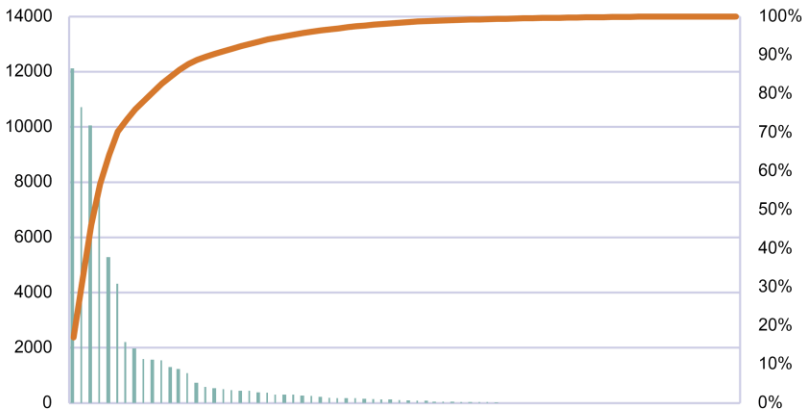
## Looking at why people are contacting the City can inform improvements to service delivery or information

The CSC categorizes contacts as either an information request or a service request. The charts to the right rank the number of requests by the reason.

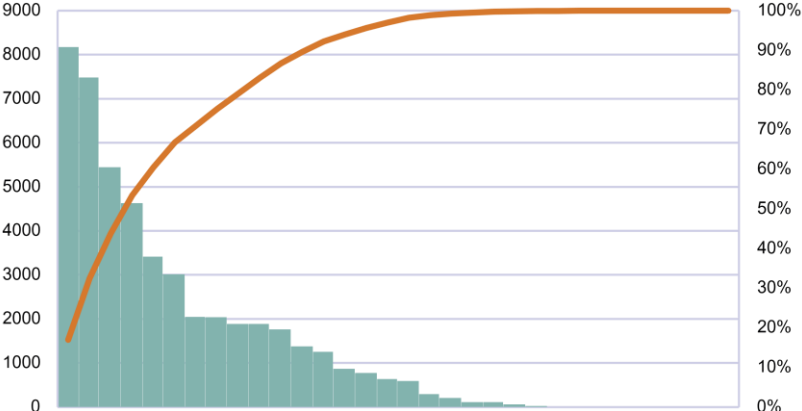
- ▶ For information requests, 80% of contacts result from just 10 reasons. Whereas 80% of service requests result from 9 reasons. Analyzing the top reasons shown in the table below could yield improvement ideas.

Information	Service
Take and Transfer to Subject Expert Staff	Property & Taxes
Property & Taxes	Finance and Accounting
Bulky Items	Parking Rules and Regulations
Other Government & Agencies	Roads & Sidewalks
Garbage	Garbage
Waste Recycling and Diversion	Street Lighting
Parking Rules and Regulations	Property Development
City Information Management	Animal Control
Animal Control	Forestry
Social Support Ontario Works	

Information Request by Reason





Service Request by Reason





# Brantford does a good job of catering to its customer base

Brantford's Customers	
	<b>General Public</b> <i>Residents living in Brantford</i> <i>Tourists</i> <i>Those interested in renting out Brantford's facilities</i>
	<b>Businesses</b> <i>Corporate organizations with establishments in Brantford.</i>

## Brantford has diverse and growing demographics, with most residents between 40-64 years of age

The results from the resident survey show that this age group prefers online and phone service channels. This aligns with Brantford's offerings as the City offers services through the phone, in person and online.

- ▶ The top three mother-tongue, non-native (English and French) languages of residents in Brantford are Punjabi, Polish and Italian.\* Close behind are Spanish, Vietnamese, Portuguese and Filipino.
- ▶ Most customer service is conducted in English only. This may impact customer experience as they are unable to comfortably communicate with Customer Service representatives about issues or inquiries.

Brantford's Customers Service Hours of Operations	
Monday to Friday 8:30am-4:30pm	<b>City Hall</b>
Monday to Friday 8:30am-4:30pm	<b>Customer Service Contact Centre</b> <i>After Hours managed by 3<sup>rd</sup> party Extend</i>

## Most customers are satisfied with the current hours of operation

This is something that peers are monitoring to determine whether demand exists outside of these hours.

- ▶ The current hours fall within working hours for most residents.

\* Based on [Brantford Population Characteristics 2021](#) data

# Online channels are the most preferred method of communication with the City

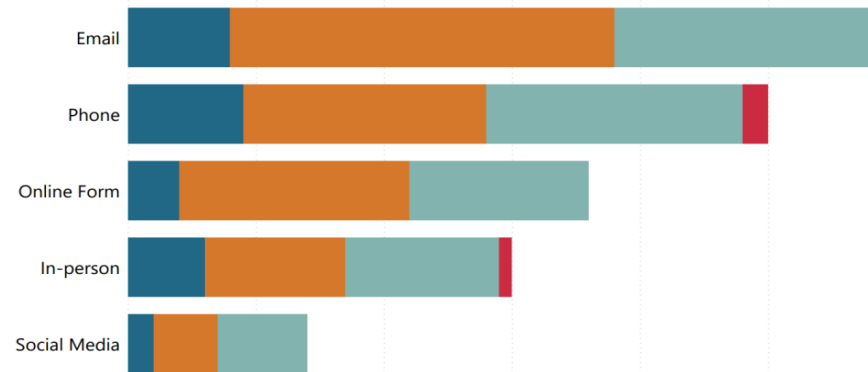
## Most residents who completed the survey prefer to contact the City by email or phone

- ▶ Even though email and phone are the preferred methods, many residents mentioned that it is difficult to find the correct contact information for their concerns on the website because of too many drop-downs on the Contact Us page.

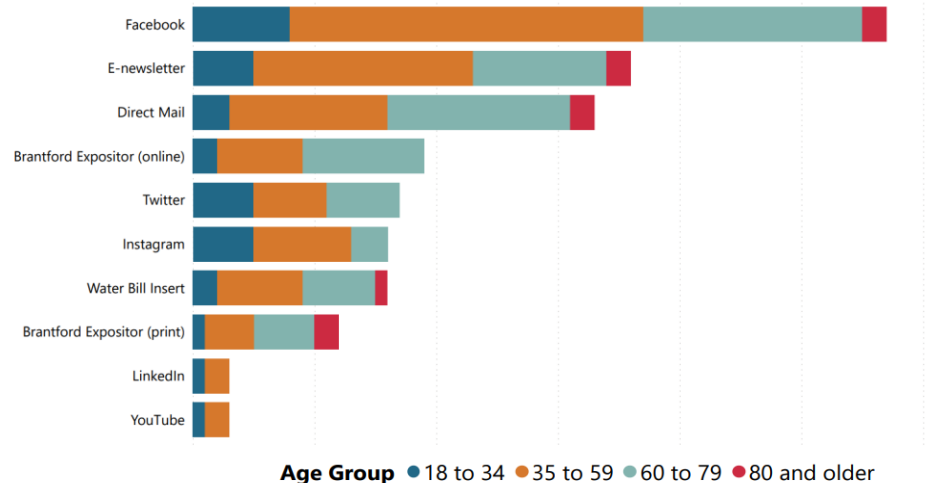
## The group's most favoured method of receiving updates from the City is through Facebook

- ▶ Even though residents prefer to receive updates through Facebook, many noted that it is easy to miss important updates on the social media platform.
- ▶ The City should explore its engagement analytics to see if the posts are reaching the intended audience and boost important updates as needed.

Preferred methods of contacting the City by Age



Preferred methods of receiving updates from the City by Age



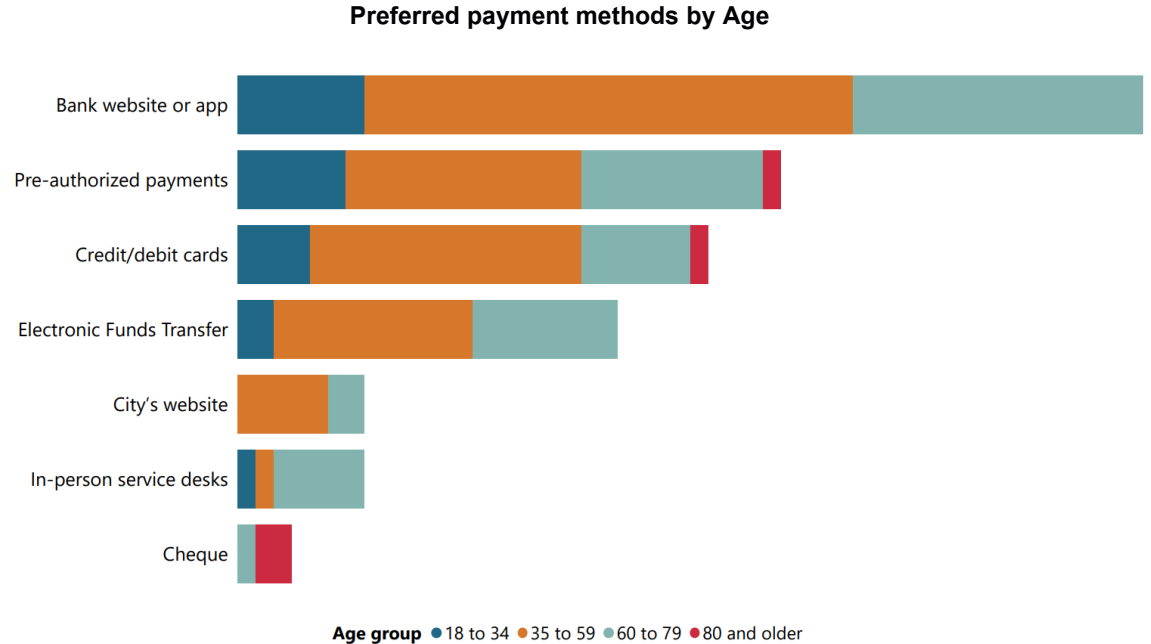
Age Group ● 18 to 34 ● 35 to 59 ● 60 to 79 ● 80 and older

# Online payments are the most preferred payment method

## All age groups, with the exception of the over 80s, prefer online payments

The 80 or older age group most preferred payment method is cheque.

- ▶ That said, paying through the City's website scored relatively lowly. This suggests that customers may be thinking primarily about bill payments – such as taxes – and not other payments such as paying parking tickets or registering for a recreation program.
- ▶ It may be worth investigating why payment through the City's website is not preferred in case there are concerns over security, for example.



# Particularly since demand seems higher than peers, the City can consider changes that may reduce demand over time



## Working Well

- ▶ Having a knowledge base accessible to customer service staff.
- ▶ Match in-person hours to customer demand.
- ▶ Offering multiple payment methods.



## Consider Changing

- ▶ Review the information available to customers for accessibility and completeness. Consider how the City could create a manageable, low-overhead, knowledge base.
- ▶ Prioritize services becoming available online by the volume of contacts to the CSC.
- ▶ Create a more flexible staffing model that can respond to temporary increases in contact volume.
- ▶ Establish a regular process that diagnoses contact volumes for information or operational changes that could reduce the volume.

**Generally, it is desirable to push down the volume of customer service contacts as they reflect a customer not being able to service their need directly**

That is not true of all contacts, but analyzing the data that the CSC has can inform changes across the City.

- ▶ The table to the left offers some suggestions on how the City might start to affect demand.





**/ CUSTOMER EXPERIENCE**

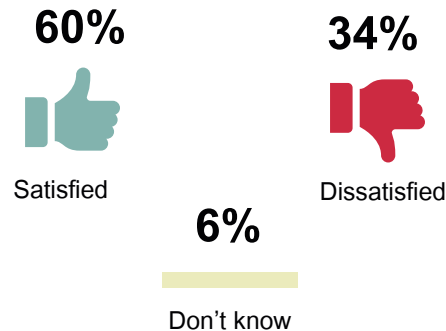
# Overall, residents reported a generally positive customer experience

Both focus groups and survey participants were asked questions about their customer experience

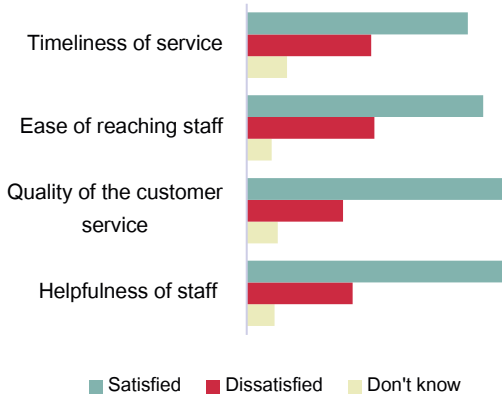
They reported that their experiences had generally been positive and that the City was meeting their expectations for customer service standards.

- ▶ The survey generated a 60% positive response, with the most positively viewed attributes being:
  - Helpfulness of staff
  - Quality of the service staff provided
  - Knowledge of staff
- ▶ However, aspects of customer service that related to the process the resident followed tended to have higher levels of dissatisfaction. They included:
  - Timeliness of service
  - Ease of reaching staff
  - Staff's ability to resolve in a single interaction

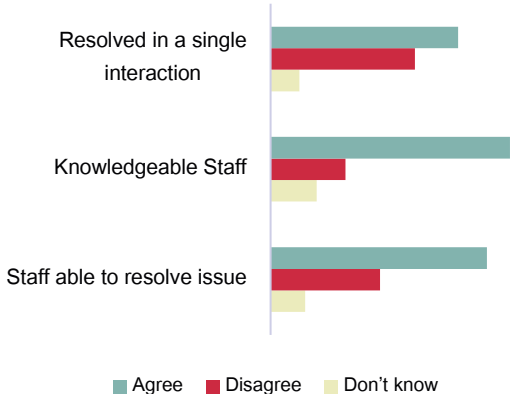
## Overall Satisfaction with Customer Service



## Customer Satisfaction Elements


































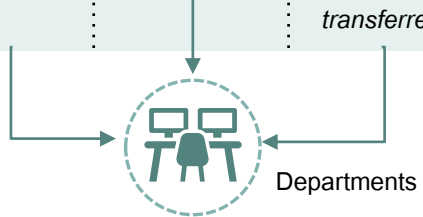







## Customer Service Elements



# There are multiple paths residents can follow to contact the City

The four channels are phone, email, in-person and via social media

While this sounds streamlined, it is actually quite fragmented as we describe in the chart below.

Channels	   	  	  	 	  	 	  	  
Touchpoint #1	City Hall CSC	Council	Department	Brantford Transit	Housing Resource Centre	Utilities	Parking Building	Gretzky Centre
								
Services Offered	1.Information/ Service Requests	1.Information Requests	1.Service Requests	1. Service Requests	1.Information/ Service Requests	1. Service Requests	1. Service Requests	1. Arena Information
	2. Triage	2. Triage	2. Triage (incorrectly transferred)					2. Tourism Information
Touchpoint #2								
CRM Used						Separate CRM used		

# Email is the preferred channel, but residents were less satisfied with the experience when they did use that channel

## The survey respondents indicated that phone was the most common channel used

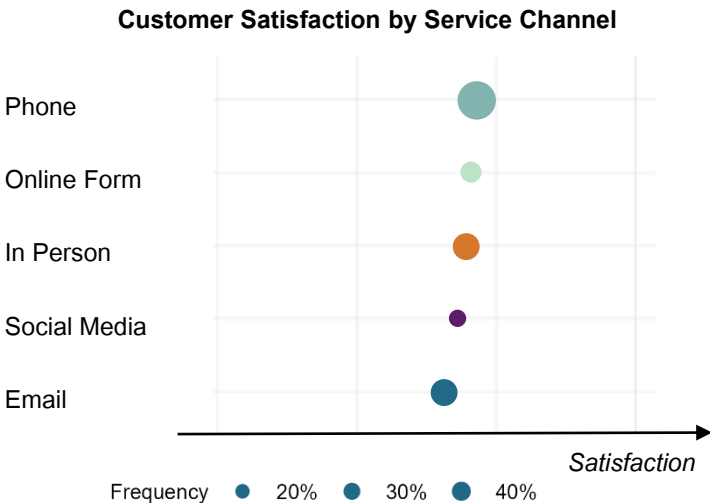
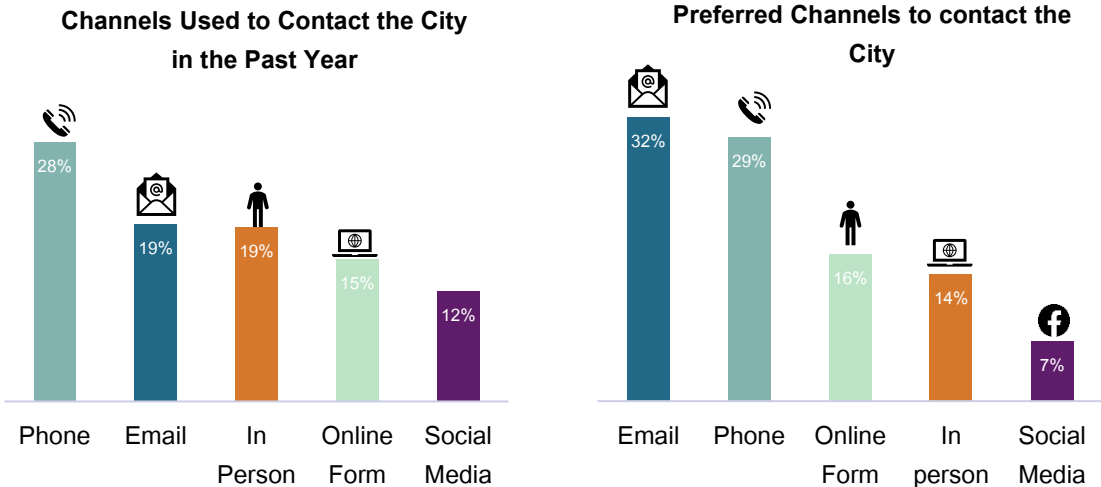
Residents noted that they don't receive acknowledgment of emails they send, which may explain the discrepancy between preference and behaviour.

- ▶ Talking to someone gives an immediate indication of how your inquiry is being dealt with.
- ▶ Feedback reinforced that a proportion of residents will always want to be able to talk to someone – so any changes the City makes should not reduce the ability to speak to a person.

## Peers are beginning to expand the range of channels customers can use to access services

A couple of peers indicated that they offer live-chat and IVR as ways of accessing the municipality.

- ▶ None of the peers had ventured into using chatbots or text as methods as yet.





# With so many access points, residents found it difficult to find the information they needed

**As well as searching through the website for information or correct contact details, they also reported being passed to multiple people before arriving at the right person**

Leaving voicemails was cited as undesirable as they were then uncertain when someone would respond to them.

## Email/Phone



The City has over 70 emails and 30 phone numbers listed for different departments under the “Contact Us” section on its website.

- ▶ Users may not be able to decipher which department to contact as their interpretation might be different than how the organization is structured.
- ▶ Some services listed are similar, e.g. there are separate options for Development Engineering and Development Engineering-Security Release.

## Social Media



Brantford has six Facebook pages where updates are posted.

1. City of Brantford
  2. Tourism Brantford
  3. Brantford Public Library
  4. Brantford Fire Department
  5. Harmony Square Brantford
- ▶ Residents stated that social media posts are not always up to date and often replicate information from the City's website.
  - ▶ One resident remarked that privately run Facebook groups post more up-to-date information.

## Website



The City website has a lot of information. Residents shared that they go through multiple pages and drop-downs to find what they need.

- ▶ City Customer Service contacts are not promoted strongly on the site. Contact Us at the top of the home page goes to the full list of contacts, whereas the Customer Service contacts are at the bottom of the page.
- ▶ Some residents would like to see a live/robo-chat option to get quick responses to their specific queries.

## In-person



Until recently, there were five in-person touchpoints for customers: City Hall, the Wayne-Gretzky Centre, the Parkade (moved to City Hall), the Housing Resource Centre, and Brantford Transit, with each providing distinct services.

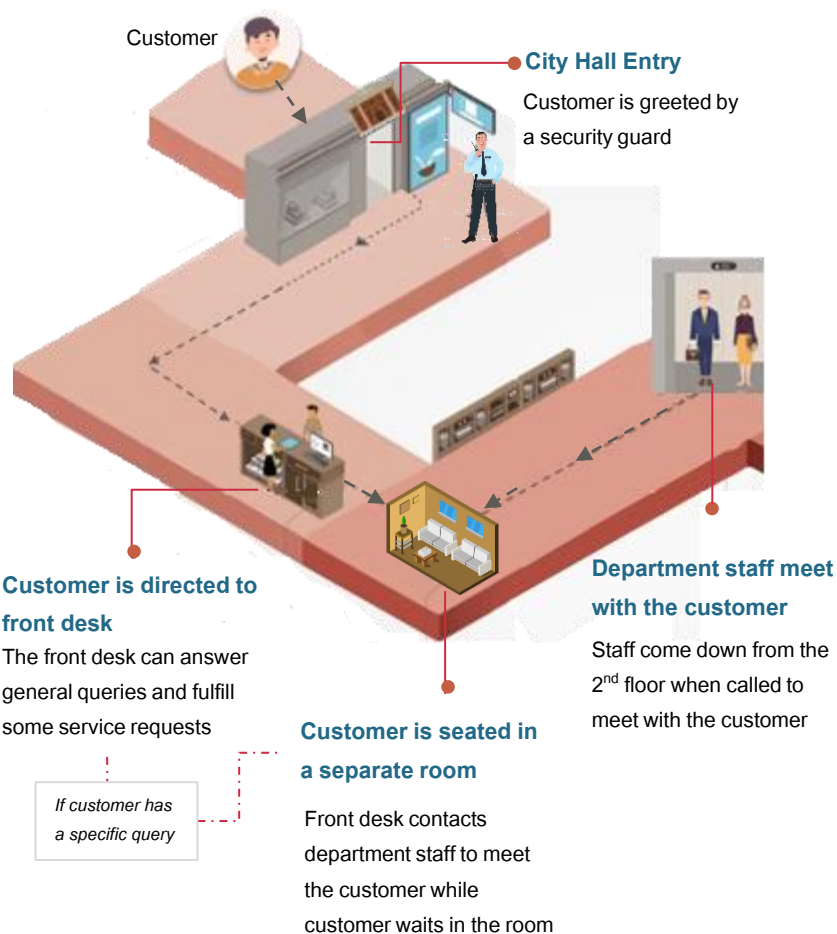
- ▶ Each of the locations is managed by a different department.
- ▶ Staff reported differing procedures and residents indicated different levels of satisfaction with the experience at the different locations.

# Those who had visited City Hall were generally positive about the experience

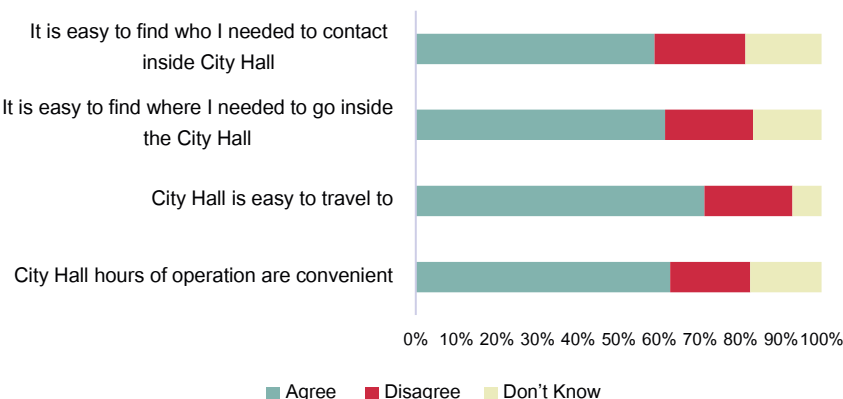
## Staff, by comparison, had many concerns about the experience at City Hall

The diagram to the right summarizes a typical visit and the potential for interacting with multiple staff.

- ▶ Upon entering the building, customers are met with a Security Guard who then routes them to the customer service front desk. The Front Desk is able to provide some services. However, if the front desk staff is unable to resolve the customer inquiry, they are seated in a separate room where they wait for relevant department staff for assistance. Staff indicated that the wait times in the rooms could sometimes be long.
- ▶ Approximately 20% of survey respondents indicated that navigating City Hall was not easy.



**In-Person Experience (City Hall)**



# Many contacts are transferred to other departments after initially contacting the City

As we saw in the Customer Demand section, over 12,000 of the 71,000 information contacts we analyzed resulted in a transfer to another department

This figure doesn't include any subsequent transfers. During our interviews, both staff and residents indicated that subsequent transfers and erroneous transfers were a source of frustration.

- ▶ Staff identified a variety of reasons for an erroneous transfer:
  - CSC staff did not have enough up-to-date information relating to the matter
  - The resident simply requested a transfer
  - The matter was more technical than the CSC could address
  - The matter was misunderstood and directed to the wrong individual
  - Person transferring did not know who was responsible for the service and so made a best effort




## First Contact Resolution (FCR) should be an aspiration

FCR refers to the contact's matter being completely addressed by the first contact the resident makes with the City, regardless of channel.

- ▶ We understand that several types of inquiries cannot be resolved on first contact, given the nature of the customer's needs. However, staff confirmed they could increase FCR with training, an updated knowledge base and scripts relating to more services.
- ▶ Some residents felt the CSRs presumed they understood the matter without fully listening and immediately transferred them, sometimes erroneously. Results from the Resident Survey indicate that "Queries Resolved in a Single Interaction" scored the lowest for Customer Satisfaction.

We observed some practical limitations that are reducing FCR for the CSC

The table below summarizes those factors.

Factors	Implications
 <b>Knowledge articles are not frequently updated</b>	<ul style="list-style-type: none"><li>▶ Knowledge base information is not kept up-to-date by all departments limiting the FCR that CSC can achieve.</li></ul>
 <b>Limited tools in Lagan</b>	<ul style="list-style-type: none"><li>▶ Lagan is not configured with call trees to help deduce customer inquiries and quickly arrive at a solution.</li><li>▶ Some staff mentioned that it takes a long time to find the right article in Lagan.</li></ul>
 <b>Limited CRM integration with other systems</b>	<ul style="list-style-type: none"><li>▶ We understand from our consultations that many of the departments have independent technology systems that they use to track their work.</li><li>▶ Where the CSC transfers a request, the department will often create the request in their system and track how it is addressed. Since these systems are not integrated with the CRM, no information flows back on the status of requests.</li></ul>

# While generally a positive customer experience, the City can make some changes to continue to improve the experience



## Working Well

- ▶ Having a live person readily accessible to residents.
- ▶ Promoting a culture of customer service and a helpful outlook among staff.
- ▶ Escalating quickly when the matter exceeds the knowledge of the customer service staff.



## Consider Changing

- ▶ Place more focus on the CSC as the access point to the City to reduce the difficulty residents face in knowing where to go.
- ▶ Increase first contact resolution by onboarding more services and enhancing the knowledge base.
- ▶ Regular CS training to help ensure the residents feel they are heard and their matter is understood.
- ▶ Establish protocols for acknowledging residents' requests are in process and providing status updates as they are complete. If this can be automated, it would reduce the onus on staff.
- ▶ Consider reorganizing so that all customer services staff report to the same part of the organization, have the same knowledge and tools, and follow the same procedures.

**Overall, the satisfaction of the experience was closely tied to the question of whether the customer got what they wanted quickly and easily**

Most felt that staff acted professionally and treated them well, but were not always able to help them quickly.

- ▶ The table to the left offers some suggestions on how the City might address the feedback.



**/ EFFECTIVENESS**



# Brantford's Customer Service Model is not completely centralized

**At first glance, Brantford's Customer Service Model appears to be centralized since many customer inquiries are handled through the CSC, which is a corporate function**

However, the City has multiple entry points for customers, all under different departments and each offering a different level of service and experience. This approach makes it more difficult to maintain a unified customer-centric culture across the organization.

- ▶ Additionally, it prevents the City from developing a holistic view of the customer service provided since data is not collected at all touchpoints. Not just a picture of who is contacting the City, but also on how the service is being delivered, such as meeting service standards.
- ▶ For example, in our interviews with staff across the City, the length of time that staff should get back to a resident message varies from 8 hours to 72 hours.

**Staff in all departments expressed their commitment to improving customer service**

The City has not set and embedded customer service expectations across the organization.







- ▶ One example cited was the availability of operational staff to address customer inquiries when it exceeds the knowledge of the CSC. In transferring a call to a department, what is the City's expectation of staff being available? Does the City expect there will always be someone available to address the inquiry?

**Brantford's Customer Service Model**



# The CSC has some standards it has adopted

These standards do not tend to work with other departments

Process	Impact on Effectiveness
 <b>Service Standards</b>	<ul style="list-style-type: none"> <li>▶ While the City has a customer service policy, we heard various standards from departments for the time to acknowledge and progress customer requests, anything from 8 hours to 72. Some residents commented that they do not hear anything back once they have submitted a request.</li> <li>▶ Customer service standards used by a department were often expressed as informal, such as “we try to reply to inquiries within 48 hours”. None of these informal service standards are measured or tracked.</li> </ul>
 <b>Transfer</b>	<ul style="list-style-type: none"> <li>▶ Departments have requested different methods for transferring phone calls/requests from the CSC. The Operations and Clerks departments require a service request; the Bylaw department requires an online form to be filled, some want a cold transfer and some require a warm transfer. This adds inconsistency and complexity to the transfer process.</li> </ul>
 <b>Update CRM</b>	<ul style="list-style-type: none"> <li>▶ Most details on customer requests are held in departmental systems or email inboxes. If customers call the CSC back for an update, the CSRs commonly do not have visibility into the progress of their requests.</li> </ul>
 <b>Council Inquiries</b>	<ul style="list-style-type: none"> <li>▶ Some Council members bypass the CSC and go to the departments directly for resolution. These requests are not inputted into the CRM software, so there is no trail of the request.</li> </ul>
 <b>Knowledge Articles</b>	<ul style="list-style-type: none"> <li>▶ The CSC has a set of information that relates to departmental services, but the completeness and currency varies by department. Some departments, such as Housing, update it periodically, while other knowledge articles in the City’s current CRM have not been updated. This impedes the CSRs’ ability to provide up-to-date and consistent information to customers. Updating articles is also a cumbersome process, requiring departments to gather the information, communicate it to CSC staff, who then update the articles in the CRM.</li> </ul>
 <b>Email Monitoring</b>	<ul style="list-style-type: none"> <li>▶ There are no SOPs on how departments should monitor emails in general mailboxes. Some residents reported waiting for weeks for a response or acknowledgement. Resident survey results show that respondents who used emails for correspondence with the City had the lowest satisfaction levels.</li> </ul>





# Routing customers is not a seamless process

## Many customer inquiries to the CSC need to be transferred to operational staff

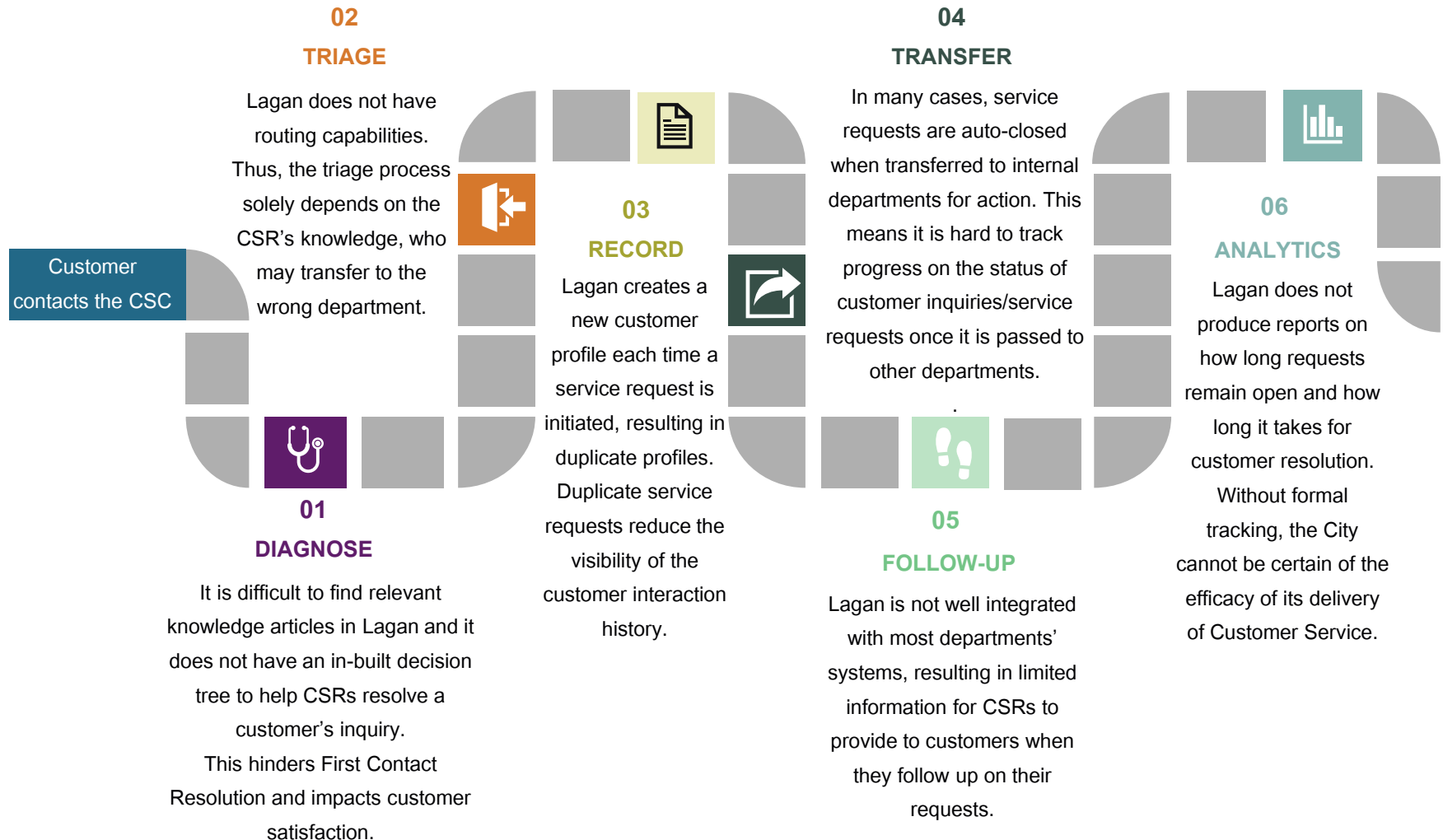
The process of triaging customers relies on the experience and knowledge of the CSR because Lagan does not have routing capabilities and the instructions in the system are static.

- ▶ Staff and customers reported erroneous transfers. At times due to CSRs not having a complete understanding of the department's responsibilities.
- ▶ As this takes away from staff time, it falls into several Lean waste categories, including excess processing, waiting and overproduction.
- ▶ Being shuffled between different departments also results in less customer satisfaction. A resident we spoke to shared that they were transferred to multiple departments as the CSR did not know where to route his inquiry.

## Staff cited some challenges they face when routing customers

Challenge	Context
 <b>Ambiguity in departmental responsibilities</b>	<ul style="list-style-type: none"><li>▶ Organizational restructuring makes it less clear for a period of time about the scope and responsibilities of different departments. CSRs also mentioned that the staff directory could be out of date.</li></ul>
 <b>Limited visibility on availability of staff</b>	<ul style="list-style-type: none"><li>▶ CSRs have limited visibility into who is available to transfer an inquiry to. To overcome this, the Planning department has implemented a "planner of the day" list to show who is available for the day and Ontario Works uses a system called IN/OUT that shows staff availability, however, the difficulty remains for most other departments.</li></ul>
 <b>Unanswered phone calls</b>	<ul style="list-style-type: none"><li>▶ Compounding the visibility is staff not able to answer calls leading the CSRs to hunt for other staff to take the transfer. As mentioned in the experience section, residents were reluctant to leave voicemails.</li></ul>
 <b>CRM tickets are not created when customers bypass the CSC</b>	<ul style="list-style-type: none"><li>▶ Many Council members and department staff do not create service tickets in the CRM when customers submit their requests directly to them. When there are no records entered in the CRM, it becomes challenging to know the status of these requests.</li></ul>

# Lagan CRM has limited functionality, which results in extra work throughout the customer service lifecycle



# Lagan is not well integrated with other City systems

## The City will always require operational IT systems to help it manage service delivery

The table to the right shows a snapshot of some of the systems the City uses that contain customer service requests or applications.

- ▶ As shown, few are integrated with Lagan. Without integration, operational systems and CRM operate as two distinct silos, leading to the fragmentation of customer data. Since the systems don't speak to each other, staff cannot see updates or changes to customer data in separate systems. One resident reported that even when he had cancelled a permit application, he still received emails from various City departments with instructions for the permit.
- ▶ As customer activity records are not centralized in the CRM, customers repeat themselves when transferred from one department to another, which can be another source of frustration.
- ▶ As systems are not connected, the CSRs do not have visibility into the status of customer requests and are unable to provide an update when customers call to follow up.
- ▶ Having non-integrated systems limits the City's ability to track customer journeys from the first point of contact to service delivery. It also makes it challenging to collect and use data to improve operations and customer service in the City.

Department	System	CRM integration
Public Works	Avantis	Limited
Utilities	CIS Infinity	Not integrated
Waste Management	Bulk Pick Up Tool	
Public Works	Tree Collector	
Bylaw, Clerks, Building	AMANDA	
Building and Planning	Cloud Permit	
Finance	JD Edwards	
Recreation Bookings	ActiveNet	
Customer Service	Web Cashiering	
Customer Service	SAMS	

## We understand that the City is looking to replace Avantis with a new system, AIM

This new system will be integrated with the CRM for any departments that the CSC currently supports, including:

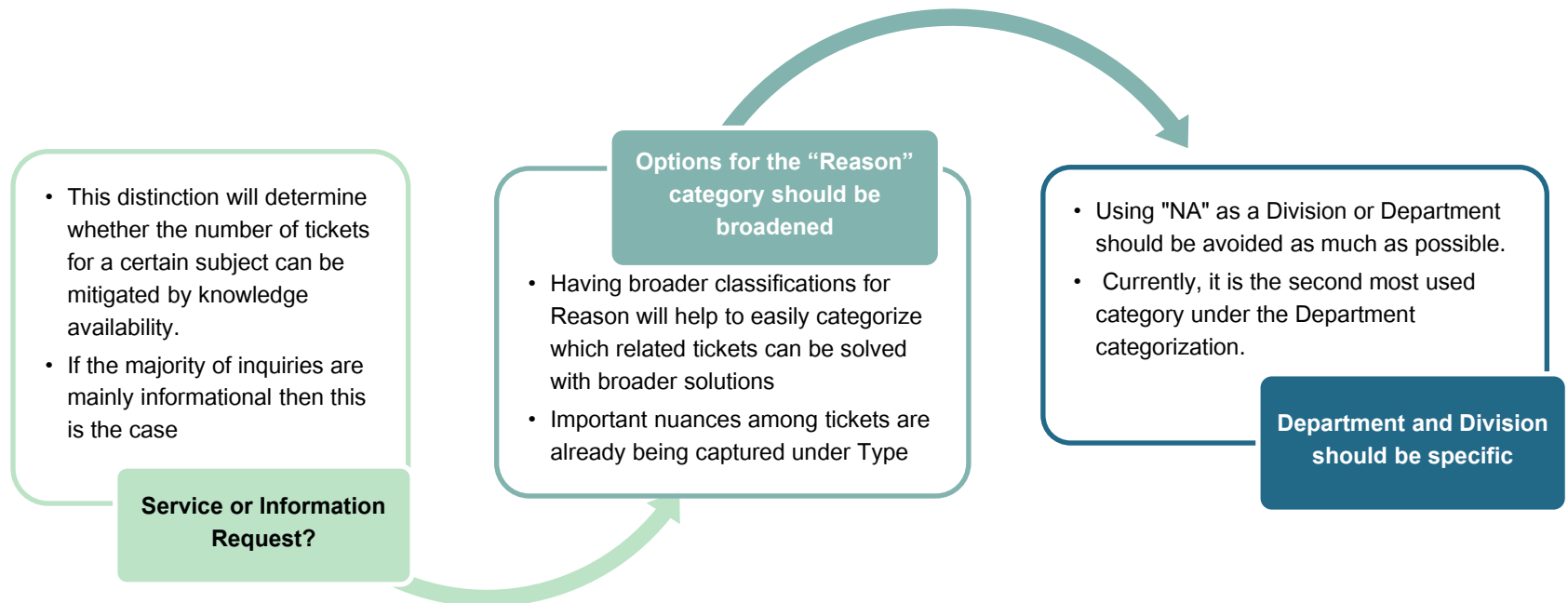
- ▶ Operations
- ▶ Traffic
- ▶ Solid Waste
- ▶ Facilities
- ▶ Parks and Forestry

# Refining ticket categorization within the CRM could make identifying areas of improvement easier

**Currently, all tickets are categorized by a *Department*, a *Division*, a *Reason* and a *Type*, which is a reasonable structure**

“Reason” refers to a broad type of problem, while the type is a more specific explanation. When we inspected the categories that were used, it appears it may limit some of the data analysis that the City might want to do.

- ▶ For example, there is a Reason that is listed as Housing under which there is a Type for “Application Process/Waitlist”. There is also a Reason category that is labelled Social Security, under which the only Type of request is “Housing Application Request”. Both “Reasons” fall under the Community Services & Social Development Commission, which has no Divisions defined.
- ▶ If the tickets are classified this way, disaggregating demand for common requests that are received by different departments is made more difficult.
- ▶ The diagram below makes a suggestion on how to update the available options.





# Brantford is processing the second-highest ratio of customer interactions compared to its peer group

## Annually, the City processes approximately 12,000 customer inquiries per customer service (CS) staff member

Being higher than average may suggest that the City has too few staff to handle the volume of inquiries received. This observation echoes the contact volumes we looked at in the Customer Demand section.

- ▶ We understand that there are two vacant positions at the CSC and as a result, we heard from current staff that they felt a high workload.

## The City's spending on CS interactions is lower than its peers

At a cost of \$7.67 per interaction, Brantford spends less than the peer group average of \$11.39.

- ▶ While Brantford's percentage of total operating expenses is higher, its higher volume of interactions means it spends less per interaction.
- ▶ Without detailed utilization numbers, this suggests the City could increase its spending on CS to bring it more in line with peers.

## The City does not forecast customer contact volume, nor does it track workforce utilization figures

Closely matching contact volume to staff capacity will enhance the customer experience and CSRs will feel less rushed to complete a contact.

- ▶ One peer receives monthly reports on its service levels, directly inform operational decisions. If a specific issue is causing capacity challenges, they will respond with process changes and communication materials to reduce volume while the issue is still relevant.

Municipality	Volume/CS Staff*	CS Expense as % of OpEx	Cost/ Interaction
Brant County	16,250	0.35%	\$4.69
<i>Brantford</i>	<i>11,667</i>	<i>0.56%</i>	<i>\$7.67</i>
Brampton	10,877	0.88%	\$9.86
Cambridge	6,667	0.73%	\$11.69
Toronto	5,850	0.06%	\$14.78
Guelph	5,714	0.13%	\$12.93
Kitchener	4,444	0.67%	\$18.09

\*Values are based on customer service volume handled by Customer Service Centre and the groups providing a similar function at peer municipalities.

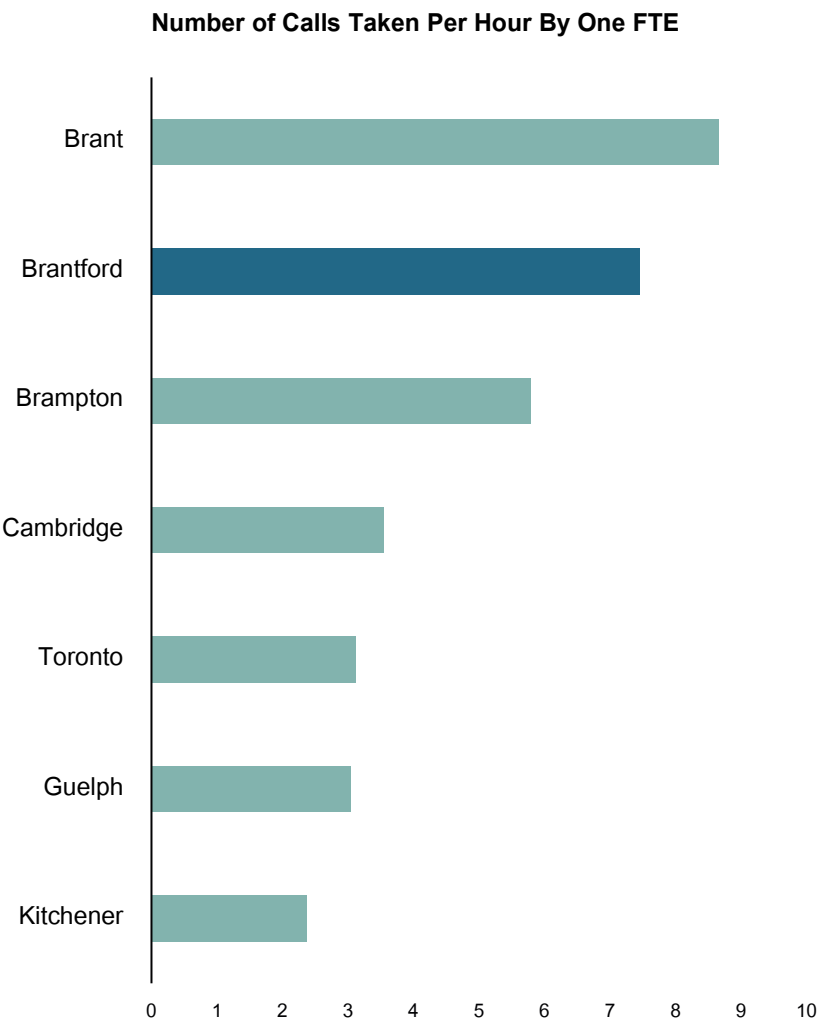
# Brantford employees answer 1.5 times more calls per hour than the peer average

**Gathered metrics from surrounding peers show that Brantford’s customer service staff received the second-highest number of calls per hour**

Informational requests make up almost 60% of calls received by Brantford staff. This might indicate that other municipalities are receiving fewer informational contacts.

- ▶ Other factors that could affect this include the complexity of the operations. Guelph, which is decentralized, currently provides in-person services and is beginning to expand the scope of its activities. Toronto Revenue Services solely deals with escalated calls that require time and subject matter expertise to resolve.
- ▶ Brant, the only peer where more calls were taken per FTE, has no CRM and uses a completely decentralized system. This means their customer service team focuses largely on redirecting calls to operating departments.

On the other hand, since customer service staff deal with a much higher volume, it may translate to customers being rushed and not always having a positive experience. This is in line with some of the feedback we heard from residents that they felt their concerns were not properly heard or understood.








# Measuring customer service metrics would help the City to continuously improve its customer service

**This falls into the third domain of our customer service framework that we presented in the introduction to this report**

The CSC call data is recorded and the call volume, queue time and abandon rate are analyzed. However, it was not clear to us how these findings are used to improve operations.

- ▶ The table to the right outlines some basic measures that are common with customer service functions.
- ▶ Industry research indicates that each of these factors has a strong correlation with customer satisfaction. Building the capability to report on the change in these metrics over time is the first step. However, for these measures to effectively inform your operations, you must also know:
  - Why the measure changed
  - What we should do when the measure changes

Key Metrics for Tracking		
	<b>First Contact Resolution</b>	Percentage of customer inquiries resolved at first point of contact.
	<b>Accuracy of Triaging</b>	How often do department contacts have to re-triage a customer to connect them with appropriate staff.
	<b>Abandonment Rate</b>	Percentage of customers who end interaction without resolution due to a breakdown in the process.
	<b>Unresolved requests</b>	Requests still outstanding past a threshold (e.g., 20 days).
	<b>Hold Time</b>	Time customer spends on hold, particularly during department transfers.

# Procedural and technological changes can help the City have a more effective customer service



## Working Well

- ▶ Promoting a culture of customer service and a helpful outlook among staff.
- ▶ Escalating quickly when the matter exceeds the knowledge of the customer service staff.
- ▶ Efforts to improve processes through technology.



## Consider Changing

- ▶ Solidify a customer-centric culture throughout the organization by agreeing on a uniform set of customer service expectations.
- ▶ Standardize processes that relate to customer service to create a seamless customer experience.
- ▶ Move customer service staff under the same accountabilities to assist with standards.
- ▶ Increase customer service staff capacity by equipping them with the right tools and technology, filling vacant positions and improving self-serve options for customers.
- ▶ Aggregate and record data from multiple citizen channels into a single location accessible by all departments to initiate fact-based continuous improvement initiatives.
- ▶ Implement performance metrics across the organization to gauge customer service success.

## The City is committed to its efforts to improve customer service

However, there are some challenges that it needs to overcome to reach its full potential.

- ▶ The table to the left offers some suggestions on how the City might address these challenges.

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10

**/ ASPIRATIONS AND IMPROVEMENTS**

# Taking the findings, we have created three focus areas to organize our recommendations, which will enhance the customer experience

These focus areas or themes identify what Brantford should aim to achieve with its next round of customer service enhancements

The diagram below highlights the three focus areas along with the specific initiatives that will help the City deliver on the area of focus.





# Making it easy to access services will drive enhancing customer experience

## Situation

- ▶ With many locations, multiple phone numbers and email addresses, as well as a complex website, customers indicated it was often hard to get what they needed quickly.

## Recommendations

Review the information available to residents and the methods by which they access the City to make it more likely they will get what they need the first time they try.

- ▶ Focus on embedding the idea that the CSC is that first point of contact for anything.

## Actions

### *1. Elevate the profile of the CSC*

- ▶ Ensure that all communications that relate to accessing City services lead with the CSC details, particularly the website. Consider additional promotion to better educate Brantford residents on the CSC, what it does for them and how to access it.
- ▶ CSC should be the primary contact information displayed on the website. Many municipalities have their customer service contact as a primary menu item at the top of the landing page.
- ▶ Conduct an educational campaign inside the organization to increase the understanding of staff about the CSC, its function and its processes.

### *2. Increase the number and types of inquiries the CSC can fully conclude*

- ▶ Work with departments to determine all the inquiries and requests the CSC could potentially address and then develop an onboarding plan that would expand the inquiries the CSC handles. This will likely be a multi-year effort as the knowledge and capabilities of the CSC grow.
- ▶ The onboarding should be supported by enhanced information and tools for the CSC, which is addressed within the Excelling at Customer Service theme.

### *3. Enhance the online experience*

- ▶ Place a focus on understanding how residents want to get information from the website and restructure it to make information more readily available. Search will likely be a key focus, making results as relevant as possible.
- ▶ The City has certainly made progress in making services available online and the CSC has the information to inform the continuation of this process to reduce the direct contacts in the case where the resident would be happy to complete it online.

# Financial implications relate mainly to staff time from the CSC

## 4. Streamline the in-person experience at City Hall

- ▶ Install a self-sign-in kiosk at City Hall for customers to enter their details and choose their purpose of visit. The kiosk should provide directions to the appropriate location and personnel based on the selected reason. If the customer has an appointment, the system should send a notification to the relevant staff. The estimated wait times should also be displayed on the kiosk screen.
- ▶ To reduce wait times, the City should streamline the process by directing customers straight to the second-floor counter to meet subject experts and improve the customer experience with clear wayfinding signage.

## 5. Council request process

- ▶ Identify a City staff person who will act as the Councillors' point of contact for service requests they have received from residents. Likely that person should reside within the Office of the CAO and have experience dealing with Councillor matters. Councillors should be able to access the person by phone, email or even in-person.
- ▶ Once received, the City staffer should channel the request into the CRM, so the details are tracked and it is routed to the right City department. Periodically, the City staffer will distribute a report to each Councillor that lists all the requests submitted from their ward, the status and any staff commentary that would help the Councillor to stay informed and get back to a resident.

## Financial Implications

The primary financial implications relate to staff time to undertake the actions laid out.

- ▶ Specific expenses are associated with initiative 3 if the City engages a third party to make the changes to the website.
- ▶ Also, for initiative 4, some expenses will relate to the technology proposed.

# Giving CSC staff the tools they need will allow them to focus more on the service they are delivering

## Situation

- ▶ Limitations on the tools and information available to staff can make it more difficult for them to meet the expectations of customers.
- ▶ In turn, the disconnect between operating departments and CSC staff means customers can feel their matter does not have sufficient priority.

## Recommendations

Improve the functionality of tools available to the CSC staff and fully integrate with operational systems to make fulsome data on customer inquiries available.

- ▶ Use the data to inform ongoing improvement to customer service operations.

## Actions

### *6. Integrate the systems*

- ▶ Integrate all systems that contain customer service requests with CRM so that customer service staff can continue to be appraised of the progress of a request. Electronic inquiries (emails, web forms) should automatically generate a ticket in the CRM that is routed to the correct department.
- ▶ These requirements, along with an expanded knowledge base, may be the trigger for the City to replace the current CRM if it cannot deliver the functionality. Additionally, the City would have to undertake a detailed technical review of its operational systems to confirm its ability to integrate with a CRM.

### *7. Expand the knowledge base*

- ▶ For staff to be effective, they need both personal knowledge and access to resources that can reinforce that knowledge. Commonly, two tools are used in customer service for this activity – a knowledge base that contains details on services and City processes and question trees that help staff navigate how to handle a specific inquiry. Both of these tools should be improved.
- ▶ Procedures should be established to help ensure that the information in the knowledge base remains current. Leading thinking suggests that, if possible, the information that departments maintain should be the same information that customer service uses – rather than a copy in a different system. This way, when departments update the information, customer service is automatically up-to-date.
- ▶ Notifications of changes would be helpful. Also, it may be worth the CSC establishing a regular immersion session for staff, where they visit a department for a few hours to be updated on their services and procedures.

# Reflecting on the data the City captures will help guide its continuous improvement efforts

## Actions

### 8. Cement customer service standards across the City

- ▶ Refresh the customer service policy by being explicit on the standards and expectations for customer service delivery. The policy should specify the expectations for responsiveness to customers and to the CSC. Particularly in the case of transfers from the CSC, departments should have a knowledgeable staff member who is always available to take on the inquiry. Given the extension of work the CSC can fully address, discussed in the Accessing Services Easily, this staff member will most likely be a technical staff member rather than administrative. Establish a system that truly indicates to CSC staff who is available to take the inquiry.
- ▶ Run a campaign to embed the refresh policy into the practices of each department.

### 9. Regular customer service training

- ▶ While initially focused on CSC staff, the City should conduct a round of training at least annually that covers the behaviours and approaches the City endorses toward customer service. Common topics for customer service training include active listening, effective communication, problem-solving and conflict resolution.
- ▶ Given the multi-year changes recommended here, the training might coincide with some of those changes – for example, as new services are onboarded.

### 10. Improve operations through data-driven insights

- ▶ Centralize all customer service requests data in the CRM to track and analyze customer inquiries and complaints from start to resolution. Once all data is in one place, the City will have accurate insights into the efficacy of its customer service operations.
- ▶ Using the insights, the City should take action to improve customer service operations. This could include making changes to processes, training the team, or investing in new tools or technologies and/or moving services online.

## Financial Implications

Improving the customer service operations will take more investment than the first area of focus on ease of access.

- ▶ Initiative 6 will require a material investment by the City. Integrating systems is a complex undertaking but foundational to enhancing customer service operations.
- ▶ 7 and 8 will largely occupy the effort of CSC staff but should be planned to occur as dedicated activities to ensure staff have the capacity to undertake them.
- ▶ Likely the City will contract a specialized customer service training organization for some elements of the regular training. Even if this takes a train-the-trainer format, where a small number of City staff take the train and then go on to train the balance of the customer service staff.
- ▶ Some investment may be required for 10 to establish the technical capability. However, the regular analysis would become the responsibility of certain CSC staff.

# Customers should receive a consistent experience that, over time, builds their expectation that customer service meets their needs

## Situation

- ▶ Understanding what is important to customers will help the City to set KPIs, measure if customers' needs are being met and make enhancements to customer service delivery as needed.

## Recommendations

Regularly collect and analyze customer feedback to identify key customer priorities.

Utilize these insights to inform customer satisfaction metrics, improve customer service processes and tailor customer service delivery to meet citizen needs.

- ▶ Effectively communicate any changes made to demonstrate the City's commitment to prioritizing customer needs.
- ▶ By doing this, the City can build trust with customers and show that their opinions and needs are valued.

## Actions

### *11. Regularly solicit customer feedback*

- ▶ Regularly seek feedback from customers through surveys, focus groups, and other channels, and use this feedback to inform decisions about City policies, procedures, and services.
- ▶ If feasible, we recommend soliciting immediate feedback after every customer interaction through a short satisfaction survey. This will provide the City with much deeper insights into customer satisfaction at each touchpoint of the customer journey. Asking targeted questions after each call can also help measure KPIs. For example, "Was your issue resolved" can directly feed into measuring the First Contact Resolution metric.

### *12. Measure performance through KPIs*

- ▶ Identify key customer service metrics and establish KPIs around them. Some potential metrics are included in Appendix C. We recommend avoiding setting conflicting performance goals to ensure the teams don't get mixed signals.
- ▶ Regularly communicate KPI performance to City staff and customers. Make sure that City staff are aware of the KPIs and their progress towards achieving them. Additionally, consider making KPI performance publicly available to customers, either through the City's website or through other communication channels. By providing transparency around KPI performance, the City can demonstrate its commitment to improving customer service and building trust with customers.

# Self-service can reduce some of the inquiries to the City

## Actions

### *13. Improve first contact resolution and minimize transfers*

- ▶ We have already recommended onboarding more services and enhancing the technology supports but the City should place a specific focus on first contact resolution. Tracking and analyzing data on whether a call resulted in resolution, was transferred and was picked up.
- ▶ Determining reasons that first contact resolution did not occur and then making adjustments to CSC procedures if warranted.

### *14. Provide customers with the ability to track their service requests*

- ▶ To enhance trust in City services, it is important to assure customers that their requests are being worked on by providing them visibility into the status of their requests.
- ▶ This may be achieved by configuring Lagan to send notifications to citizens whenever there is a status update on their request along with an estimated completion time.

## Financial Implications

The initiatives to build trust require new operational processes to be embedded in the CSC rather than specific financial investments.

- ▶ Self-service capabilities in 14 are the exception where some system work will be required. If the City concludes, based on some of the other initiatives, to replace its CRM, then these capabilities may become available.



# These recommendations set the City on a path towards implementing Brantford311 and a Resident Portal

**The City's efforts to improve access to services, excel at customer service and build trust with citizens will lead to a more integrated and streamlined experience**

In the longer term, the City should consider implementing Brantford311 and a resident portal creating a more centralized platform for citizens to access services. The implementation of our recommendations will lay the foundation for these platforms, which will further enhance the accessibility and convenience of City services, showcasing the City's dedication to delivering exceptional customer service.

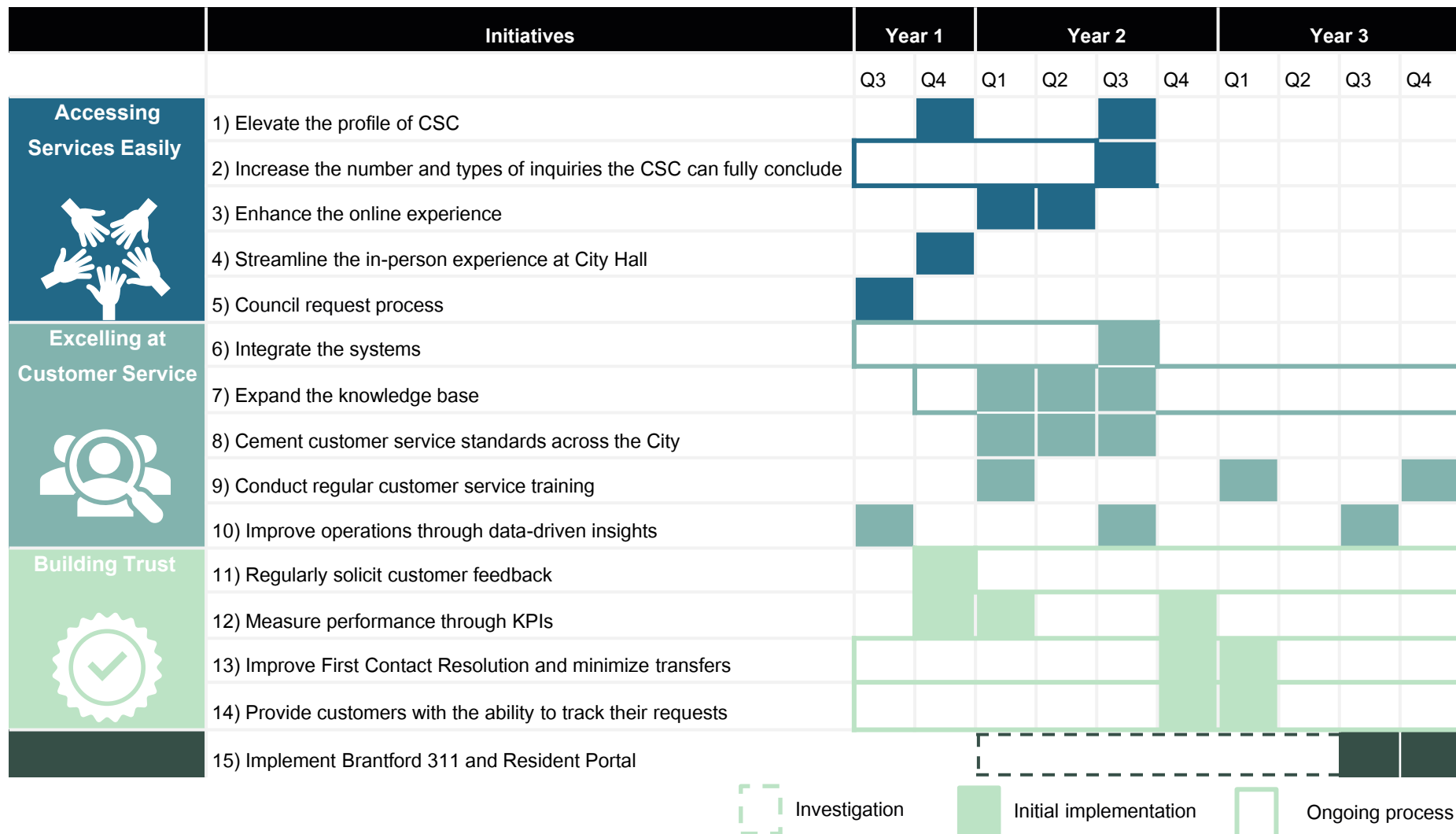
**The City should not wait to begin investigating the feasibility of 311 or a resident portal**

If this is a target for the City, decision made in the next few years relating to our recommendations could affect the feasibility of 311 and a portal.

- ▶ For example, to be effective, a resident portal will need some access to operational systems – the integration contemplated here could enable or prevent that from happening. Additionally, investigating the geographic feasibility of a 311 number is warranted sooner than later, in case collaboration with neighbouring municipalities is required.



# The City should sequence the initiatives over multiple years



# APPENDICES

Appendix A

**/ PEER REVIEW**

## Appendix A: Peer Review








# Seven municipalities from across Ontario participated in the peer study

**As input to the City of Brantford's customer service strategy, Blackline contacted several municipalities across Ontario to participate in a peer review**

Participating municipalities provided statistical information about operations and finances. As well they completed a qualitative questionnaire to give insight into their customer service activities.

- The scope covers areas related to customer service operations, including operations, finances and the use of Customer Relationship Management (CRM) systems. It focuses on the specific services and areas listed below.

Area	Description
<b>Customer service</b>	Approach, recent changes, policies, and KPIs
<b>Operations</b>	Staffing and volume metrics
<b>Finances</b>	Operating expenses and analysis
<b>CRMs</b>	Systems, integration, planning and issues

Participating Municipalities	
	Brantford
	Brant
	Brampton
	Cambridge
	Guelph
	Kitchener
	Toronto (Revenue Services Division)

## Appendix A: Peer Review

### The peer group spans across the Greater Golden Horseshoe

Municipalities were invited to participate based on a range of characteristics, including population, geographic size and sophistication of their customer service



## Appendix A: Peer Review

The peers reflect a range of customer service models

Municipality	Service Model	CRM System	Total FTEs *	Annual Inquiry Volume (000s)	Volume per FTE (000s)	Volume per capita	Budget (000,000s)	Percent of Municipal OpEx	Budget per Capita	Pop.
<b>Brantford</b>	Hybrid	Lagan	7	84	12.0	0.8	\$6.4	0.56%	\$6.11	104,688
<b>Brampton</b>	Hybrid	Dynamics	57	620	10.9	0.9	\$6.1	0.9%	\$9.32	656,480
<b>Brant</b>	Decentralized	<i>None</i>	4	65	16.3	1.6	\$0.3	0.3%	\$7.73	39,474
<b>Cambridge</b>	Centralized	Maximo	15	100	6.7	0.7	\$1.5	0.7%	\$10.84	138,479
<b>Guelph</b>	Hybrid	Dynamics	7	40	5.7	0.3	\$0.5	0.1%	\$3.60	143,740
<b>Kitchener</b>	Centralized	Lagan	27	120	4.4	0.4	\$2.2	0.7%	\$8.01	256,885
<b>Toronto (Revenue Services)</b>	Centralized	<i>None</i>	80	468	5.9	0.2	\$6.9	0.1%	\$2.33	2,794,356

\*Includes full-time staff plus one-half of part-time staff.



Appendix A: Peer Review

Peers are beginning to expand the range of channels customers can use to access services

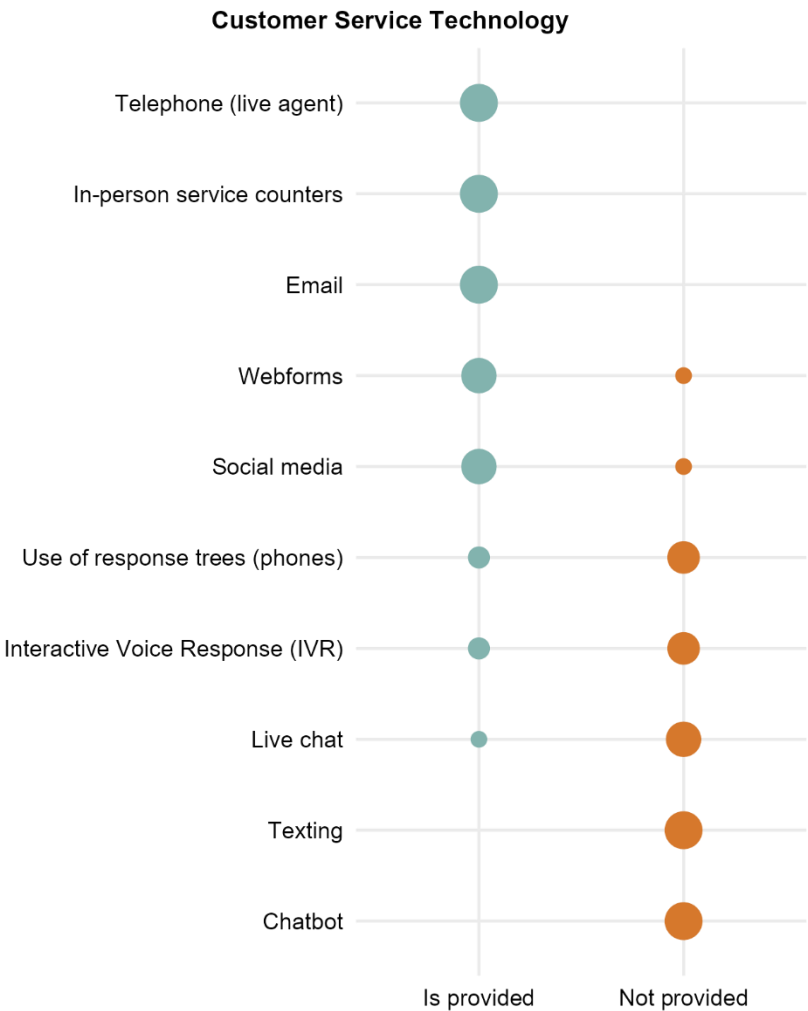
The traditional channels of phone (live agents) and in-person service counters remain pervasive, with all peers offering these

The chart to the right shows that as we move from traditional to more recently available modes, fewer peers offer the channel.

- ▶ Similar to phone and in-person, email and social media are near pervasive. web-forms, while used by most, do not span a full range of customer service inquiries, for example, some still provide PDF forms.
- ▶ Supporting technology such as response trees and IVR are less prevalent, which is surprising as these have been commonplace in other industries for many years. Asynchronous technologies such as live chat, texting and chatbots are rarely used.
- ▶ However, infrastructure technologies nowadays have many of these features embedded and as some the peers are planning to upgrade systems, they will be able to implement new technologies, including email management systems, live chat, online payment functionality and more online self-service options.

Challenges faced by peers include communicating status updates to residents and meeting their service expectations

- ▶ Technology issues like outdated systems, lack of support and non-customer-oriented processes were all cited as contributing factors.



Appendix A: Peer Review

Customer service generally operates between 8.30am and 4.30pm

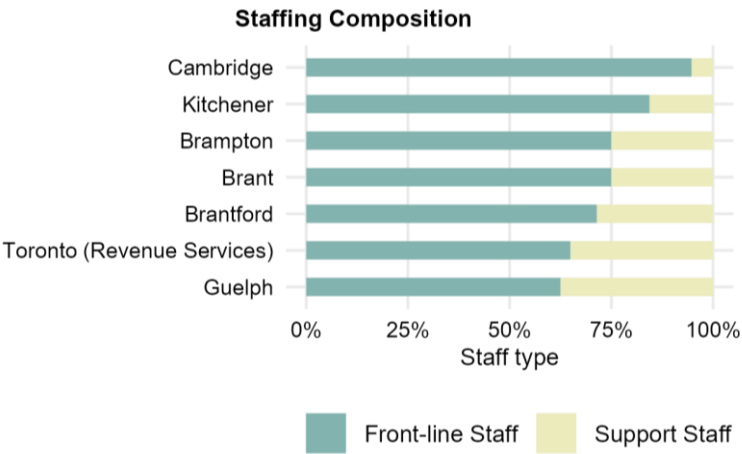
Two of the peers, Brampton and Kitchener, offer 24/7 service

Although anecdotally, requests are lower outside of the core service hours.

- ▶ Peers typically have a call centre or centralized facility to respond to phone calls. Some customer service departments are responsible for in-person service at recreation or community facilities
- ▶ Service at these facilities typically follows their hours of operation, usually until at least 9:00 pm in the evening.

On average, three-quarters of customer service staff are front-line staff

Support positions include managers, supervisors, quality and knowledge management specialists and workforce management and business analysts, shown in yellow on the chart.



## Appendix A: Peer Review

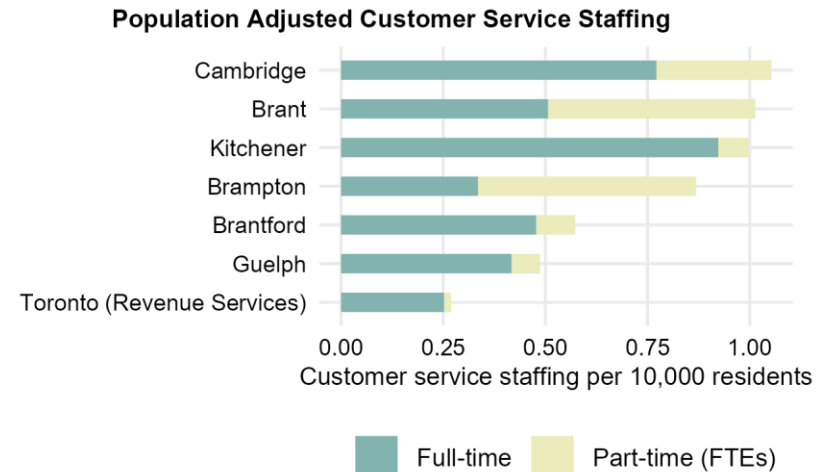
### No themes emerged relating to staffing levels or the use of full-time versus part-time

**The number of staff adjusted for population ranged from as low as 0.25 to as high as 1 as shown on the right**

We could not find any strong correlation to external factors as to why the peers chose a specific staffing level.

- ▶ We investigated population, inquiries per resident and average service length, none of which were good forecasters of staffing levels. This suggests potentially that staff is determined based on expected wait times for residents – which implies that this wait time is different at each municipality.
- ▶ Peers are tending towards one FTE for every ten thousand residents (the average of the group was ~0.75). Guelph currently has fewer but is considering expanding its customer service function. Toronto's Revenue Services is a second-line customer service function, which may explain why it is lower.

**Most staff are employed full-time, although both Brampton and Brant have a large complement of part-time customer service staff**



## Appendix A: Peer Review

# Inquiry volume and staffing efficiency are closely related

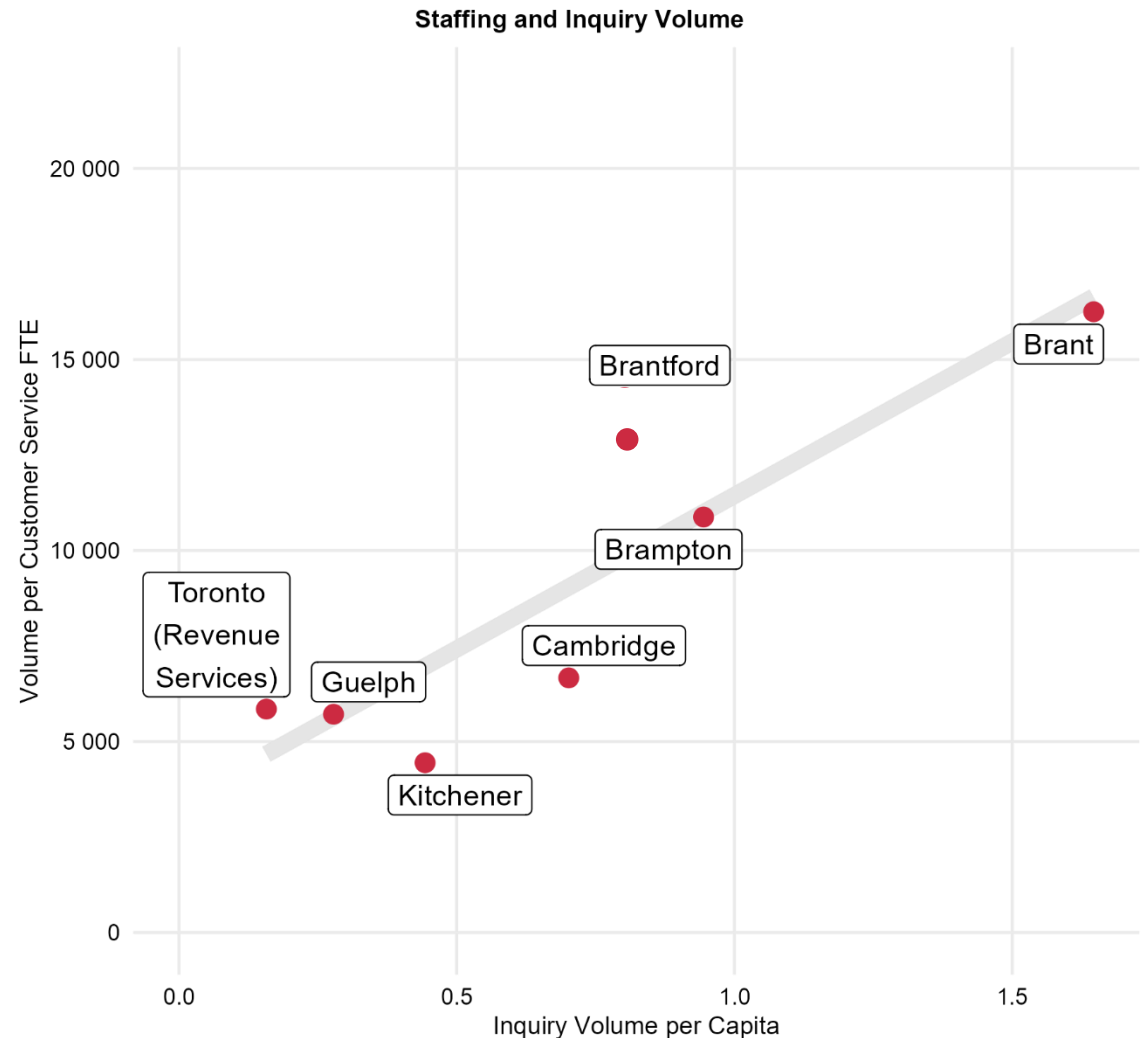
**The more inquiries received per resident, the less time tended to be spent addressing them**

The chart to the right shows that as inquiries go up, so does the number of inquiries handled by a staff member.

- Some of this variance may be related to the complexity of inquiries dealt with by customer service staff. For example, Brant has a decentralized model with their customer service team redirecting calls to operating departments, while Guelph, which is also decentralized, currently provides in-person services and beginning to expand the scope of their activities. Toronto Revenue Services solely deals with escalated calls that require time and subject matter expertise to resolve.

Additionally, those that have more extensive online services seem to have higher call times.

- This suggests that the more simple inquiries are done online, while more complex ones still come to staff.



## Appendix A: Peer Review

# Most peers operating models are more centralized than decentralized

### Most provide a front-line service to at least some operating departments

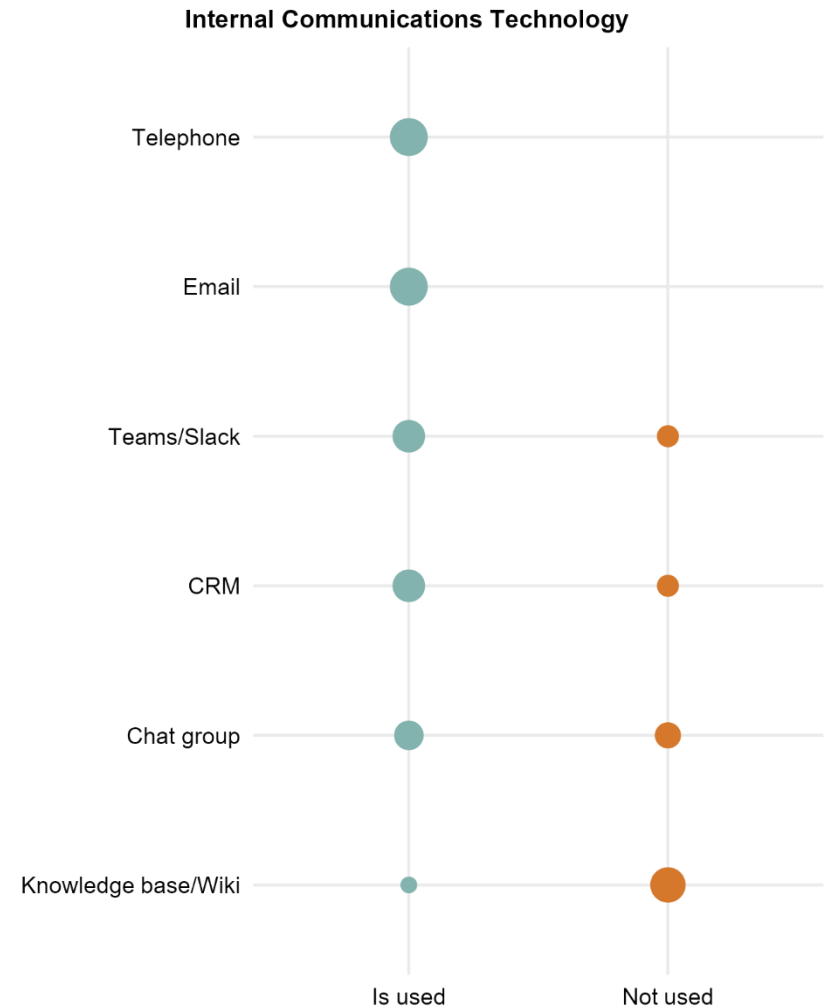
However, operating departments tend to retain some customer service functions.

- ▶ The general trend is towards a more centralized customer service model by onboarding new operating departments. As customer service functions field inquiries for departments, they need effective methods of communicating with those departments both to gather additional information or to transfer residents.
- ▶ Most identified that tracking escalations and transferring the customer to operating departments as a challenge. This was generally attributed to poor integration of systems and a siloed approach to tracking customer interactions.
- ▶ The chart to the right shows that all peers use telephone and email to communicate with departments, which both suffer from the problem of staff availability to respond.
- ▶ Formal knowledge bases or wikis are not commonly used. Those that do have knowledge bases have staff dedicated to maintaining the articles through regular updates from departments.

### Several peers noted a recent increase in disrespectful customer behaviour

Half currently have formal complaint-handling policies or a customer code of conduct.

- ▶ Service requests from Councillors are generally made directly to operating departments, but a few peers encourage the use of formal channels.



## Appendix A: Peer Review

# Peers agree that the key benefit of a CRM is centralizing customer service information – allowing staff to be more responsive to residents

### Most peers currently use a CRM or have chosen one for implementation

The systems used by peers are common in municipalities with two using Lagan and with two Microsoft Dynamics CRM.

- ▶ Peers generally agreed that having knowledge base access is a key CRM benefit, however, most wanted improved integration with their broader application network.

### Little integration exists between CRMs and other business systems

Only Brantford handles customer identity management through a CRM. Other peers use a second system with varying levels of integration.

- ▶ Other than Brampton, most peers' CRM systems have little integration with the online portals customers use for service and information requests. Several peers are working towards improving integration.
- ▶ Some peers integrated their CRM with Power BI for reporting, which is straightforward for those using MS Dynamics.
- ▶ Peers noted that CRM features that improve their ability to report on customer interactions, such as categorizing service requests and tracking response time, are most useful.

Municipality	Primary driver for CRM use	Current Integration
<b>Brampton</b>	▶ Integrating online customer services and providing knowledge base access	▶ AMANDA, Power BI and Cityworks
<b>Brant</b>	▶ Does not use CRM	
<b>Brantford</b>	▶ Centralizing customer service requests	▶ AMANDA ▶ Currently integrating Cartegraph
<b>Cambridge</b>	▶ Improving data tracking	▶ Limited
<b>Guelph</b>	▶ Centralizing customer service and tracking workflows	▶ In progress
<b>Kitchener</b>	▶ Managing contact centre and improving customer experience	▶ In progress
<b>Toronto</b>	▶ The Revenue Services Division does not use a CRM, but finds centralized email intake to be beneficial	

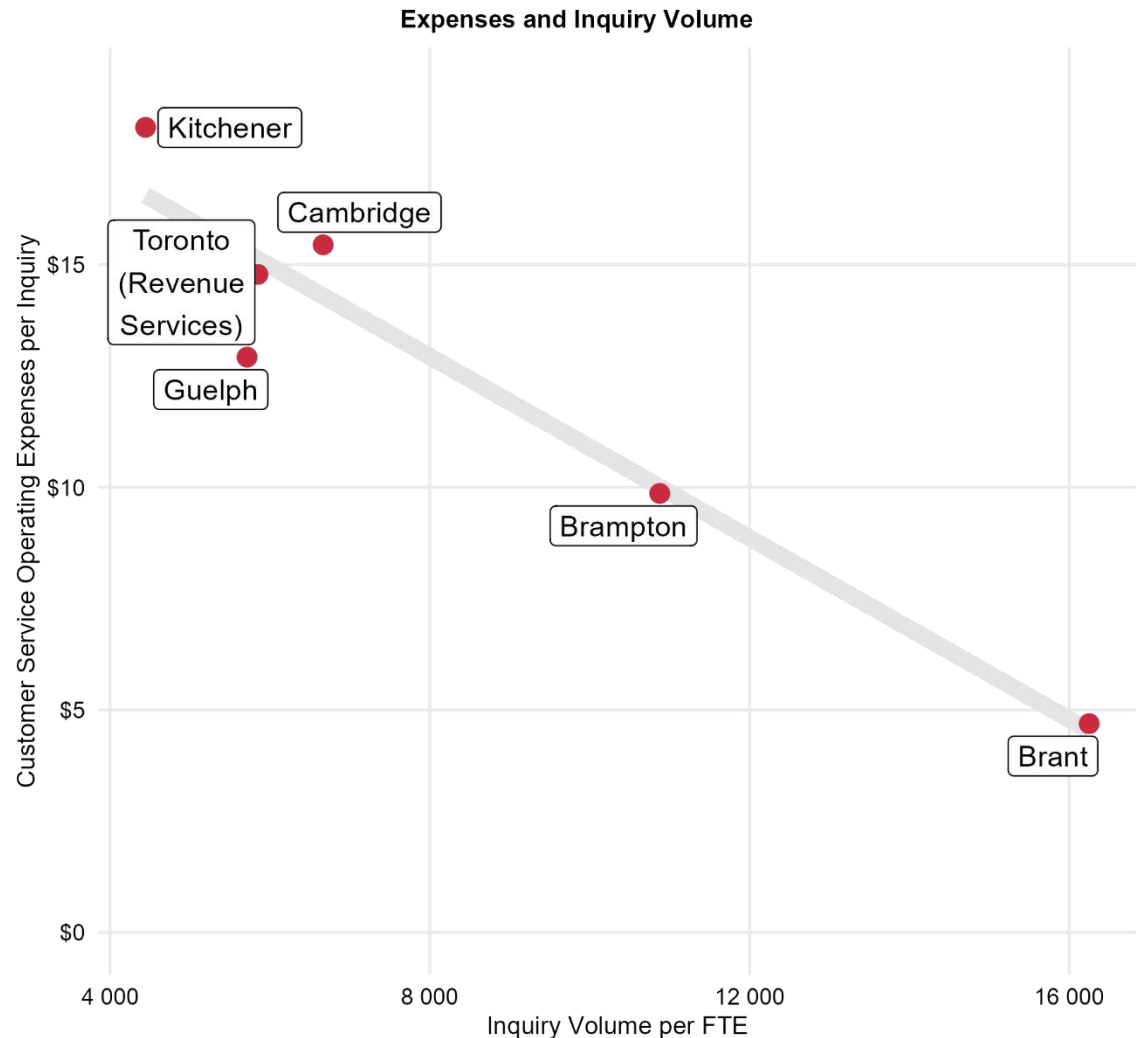
## Appendix A: Peer Review

# The cost of serving customers was similar among the peers

### Operating expenses per resident range from \$7.73 to \$10.80

Guelph, which is expanding its customer service activities, currently has operating expenses of \$3.60 per capita. Toronto's Revenue Services, which provides a subset of overall customer service, is the lowest.

- ▶ The volume of inquiries per FTE is strongly related to the operating expense per inquiry, as shown in the chart to the right. Brampton has a 24/7 operation and uses a mix of part-time and full-time staff, with operating expenses below \$10 per inquiry.
- ▶ Salaries and benefits make up most of customer service operating expenses, ranging from 87% to 99%. This explains why inquiries per FTE is such a strong predictor.





Appendix B

# / RESIDENT SURVEY

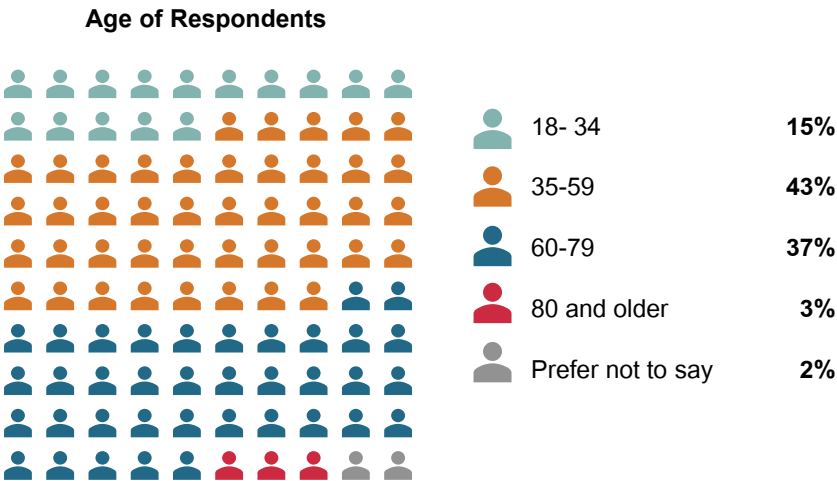
Appendix B: Resident Survey

We received 131 responses from residents to the Customer Service survey

The online survey was available to the residents of Brantford through the Brantford Lets Talk Platform

The purpose of the survey was to understand residents’ interactions with the City and their views on the service they receive. The survey also collected resident feedback on opportunities for improvement.

- ▶ The survey received 131 responses
- ▶ Most of the respondents that completed the survey were long-time residents, with the **average number of years lived in Brantford being 26 years**. Many respondents had been living in the City all their life.
- ▶ The survey was available from February 01<sup>st</sup> to March 02<sup>nd</sup>, 2023.
- ▶ As an online, opt-in survey no margin of error can be assigned to the results. Responses are unweighted.



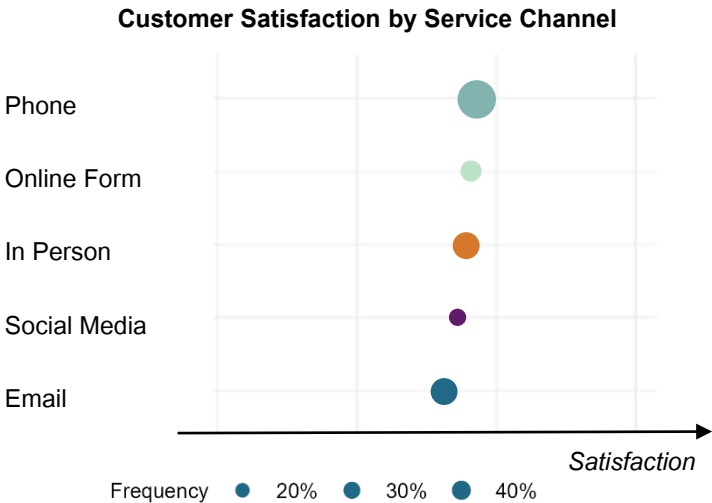
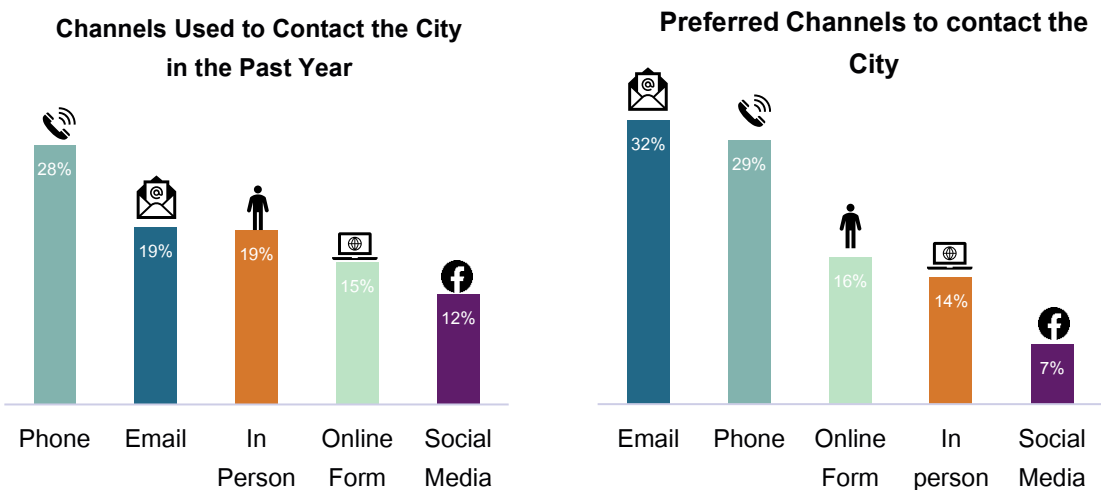
# Appendix B: Resident Survey

## Email is the preferred channel, but residents were less satisfied with the experience when they did use that channel

The survey respondents indicated that phone was the most common channel used

Residents noted that they don't receive acknowledgment of emails they send, which explain the discrepancy between preference and behaviour.

- ▶ Talking to someone gives an immediate indication of how your inquiry is being dealt with.
- ▶ Feedback reinforced that a proportion of residents will always want to be able to talk to someone – so any changes the City makes should not reduce the ability to speak to a person.



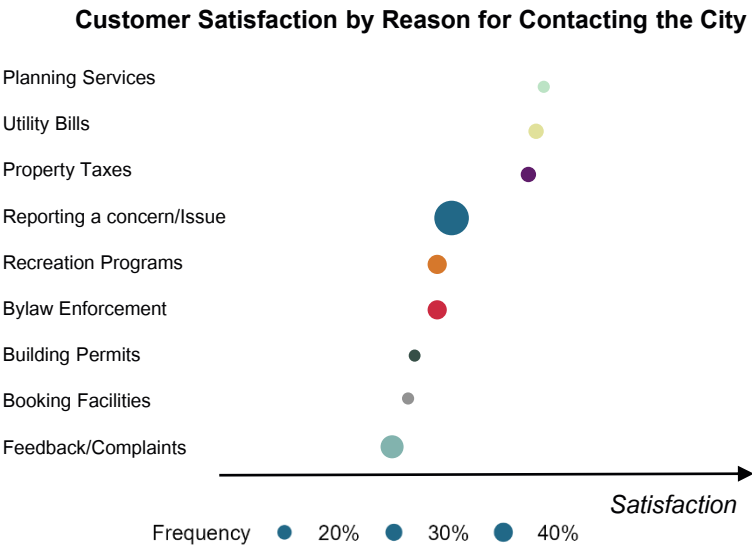
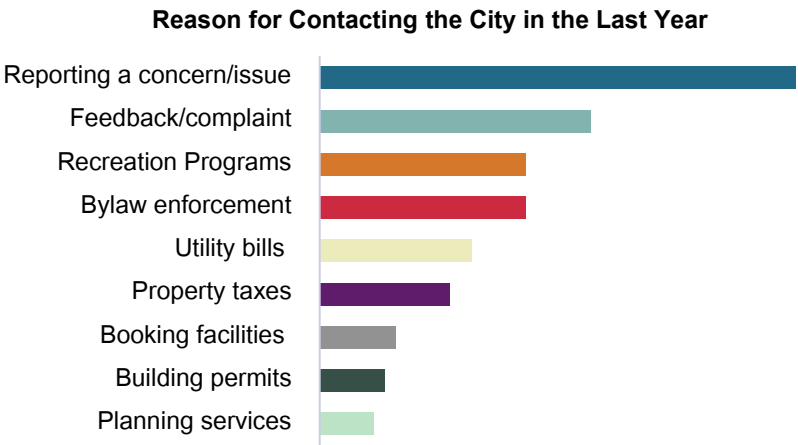
Appendix B: Resident Survey

Reporting a concern/issue was the most cited reason for contacting the City

Blackline conducted cross-tabulations between overall satisfaction ratings and reasons for service

This analysis can be used to pinpoint specific service issues.

- ▶ Results indicate that most respondents who selected “Reporting a concern/issue” as their reason to contact the City, had an average overall satisfaction rating.
- ▶ Feedback/complaints was the second most selected service issue; however, it had the lowest satisfaction rating. This indicates that customers are most dissatisfied when they are submitting a feedback/complaint to the City.



## Appendix B: Resident Survey

### Most customers were satisfied with the service they received

#### Overall, most customers were satisfied with the customer service they received

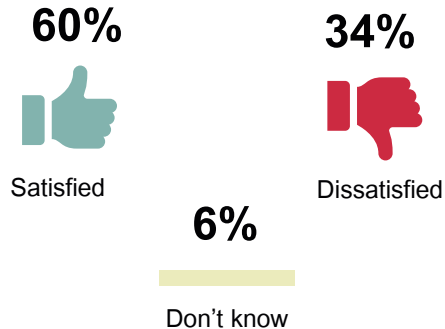
The elements that received the higher than average satisfaction ratings were related to staff attributes such as:

- ▶ Helpfulness of staff
- ▶ The quality of the service staff provided
- ▶ Knowledge of staff

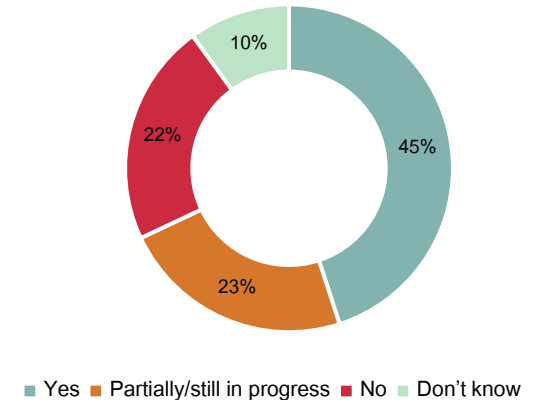
However, process-related elements received lower than average ratings, e.g.:

- ▶ Timeliness of service
- ▶ Ease of reaching staff
- ▶ Staff's ability to resolve issues in a single interaction

#### Overall Satisfaction with Customer Service



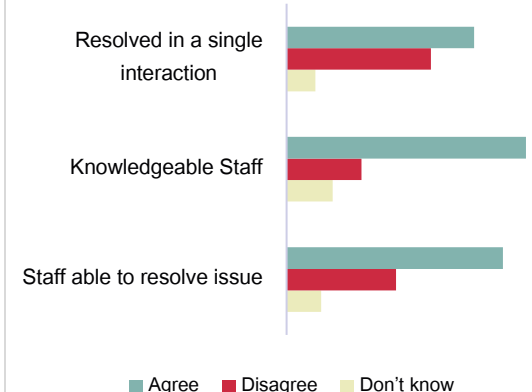
#### Received Desired Outcome



#### Customer Satisfaction Elements



#### Customer Service Elements



## Appendix B: Resident Survey

# Ability of staff to resolve issues is the key driver for customer satisfaction

**Blackline conducted a regression analysis to understand what factors drive overall satisfaction**

As the scores are based on averages, being in the left/right or top/bottom quadrant means a score above or below the average.

**Ability of staff to resolve issues is the most important driver for customer satisfaction**

However, it received an average satisfaction rating and has some room for improvement.

**There are some priority areas for the City to focus on such as:**

- ▶ Improving service resolution in a single interaction
- ▶ Providing timely service
- ▶ Ability to reach staff with ease

**Elements that received higher than average satisfaction ratings include:**

- ▶ Quality of customer service
- ▶ Knowledgeable staff
- ▶ Helpfulness of staff



Appendix B: Resident Survey

Most respondents who have visited City Hall in the last year had a positive experience

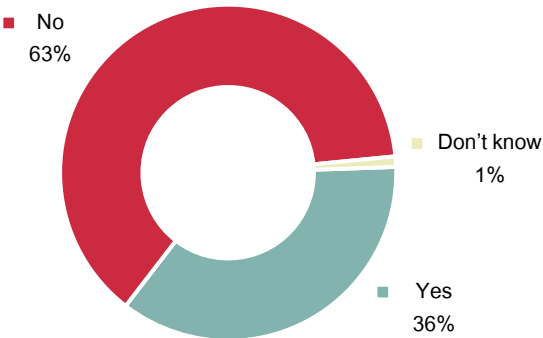
Many respondents have not visited City Hall in the past year.

The move to services offered online may have been a factor in most residents not needing to visit City Hall.

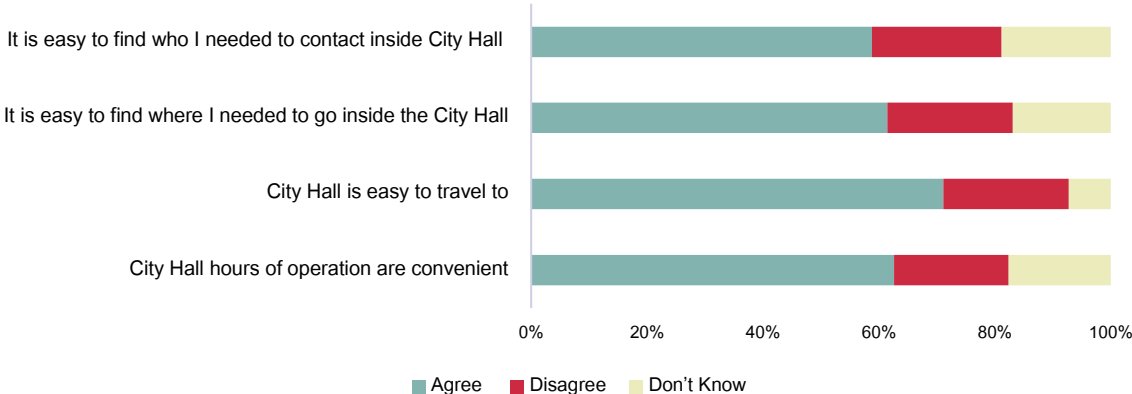
Most of those who did visit City Hall had a positive experience

- ▶ Most respondents found it easy to travel to City Hall.
- ▶ However, fewer respondents agreed that the hours of operation were convenient, that it was easy to find a way around the City Hall, and that it was easy to find whom to contact.

Visited City Hall in the Past Year



In-Person Experience (City Hall)



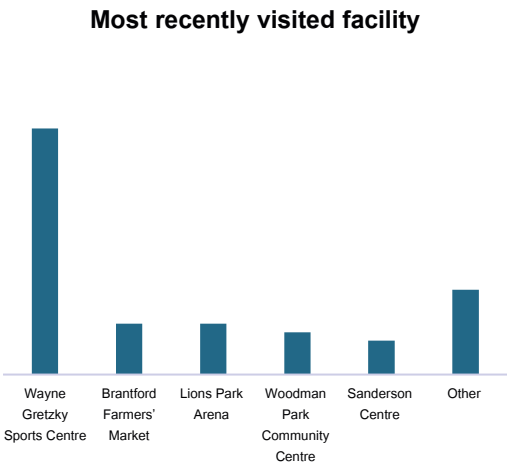


Appendix B: Resident Survey

Most respondents who have visited City Facilities had a positive experience

65% of the respondents have visited a City Facility in the past 6 months

Wayne Gretzky Sports Centre was the facility most respondents had recently visited.



Most indicators of customer experience in City facilities scored high

- ▶ However, the helpfulness of staff and convenience of hours of operation scored lower than the others.



## Appendix B: Resident Survey

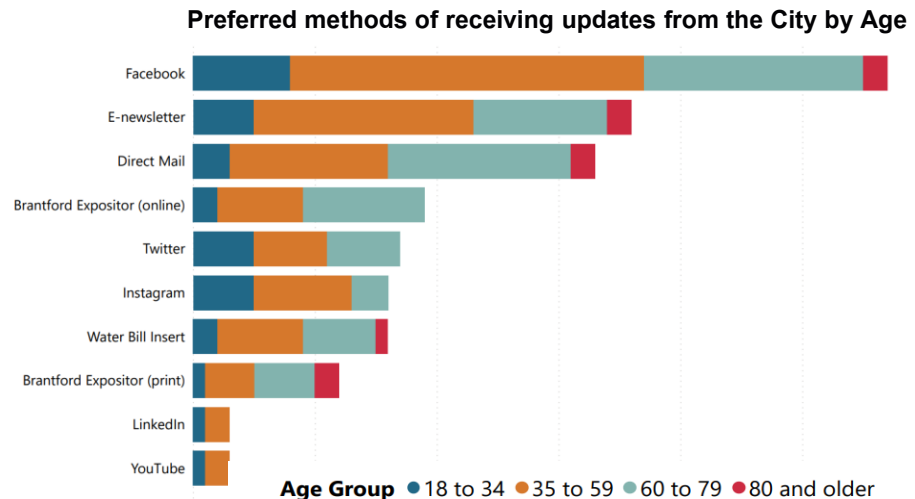
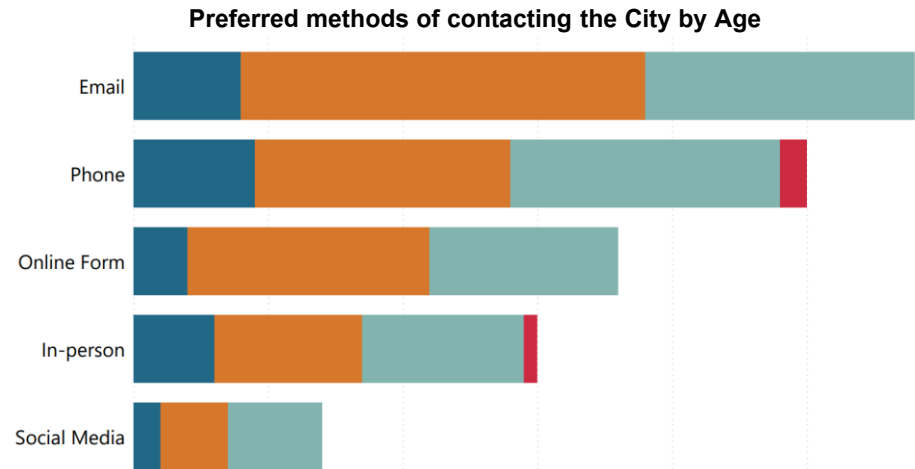
# Online channels are the most preferred method of communication with the City

### Most residents prefer to contact the City by Email or Phone

- ▶ Even though email and phone are the preferred methods, many residents mentioned that it is difficult to find the correct contact information for their concerns on the website because of too many drop-downs on the Contact Us page.

### The most favoured method of receiving updates from the City is through Facebook

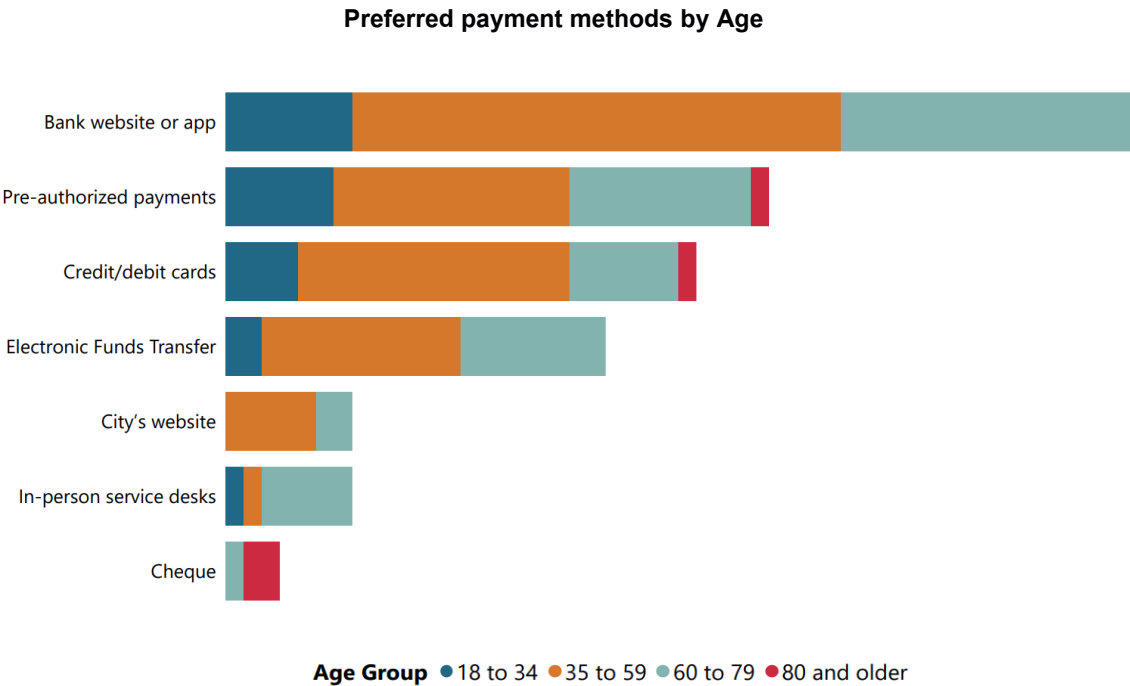
- ▶ Even though residents prefer to receive updates through Facebook, many noted that it is easy to miss important updates on the social media platform.
- ▶ The City should explore its engagement analytics to see if the posts are reaching intended audience and boost important updates as needed.



# Online payments are the most preferred payment method

Most age groups prefer online payments

- ▶ Online payment through the bank is the most preferred payment method for all age groups except 80 or older.
- ▶ The 80 or older age group mostly prefer payments by cheque, followed by pre-authorized payments, credit/debit cards.
- ▶ The City should continue to offer multiple payment methods for the various age demographics of the City.



## Appendix B: Resident Survey

# Respondents left many comments relating to Customer Service at the City

### Most comments related to:

- ▶ Interactions with City staff
- ▶ Communication with the City
- ▶ Layout of the new City Hall
- ▶ Issues related to processes and portals

### Many residents feel unheard by the City

Many residents expressed that despite repeatedly voicing concerns, their issues were not resolved, making them feel unheard by the City.

### There were some general comments about the City relating to:

- ▶ Longer hours of operations for Gretzky Centre and City Hall
- ▶ The conditions of the roads
- ▶ Not enough red lights on the roads
- ▶ Need for better recreational programming
- ▶ Need to include organic waste pick up

### Many had issues when interacting with staff



Don't receive updates on the request



Rude staff



Front line staff are not able to resolve inquiries



Would like to see service standards so staff is accountable

### Many residents do not like the new City Hall Layout

Comments indicated that residents do not like:



Being greeted by the security makes them feel unwelcome



Waiting in a designated room



Not being able to go to departments directly

### Residents would like the City to do more with incoming and outgoing communication

Residents suggested the City to implement:

- ▶ City 311
- ▶ Chat options
- ▶ Inquiries submitted through Facebook

Residents would also like to receive more updates from the City through monthly newsletters

### Many respondents noted issues with:



Process of booking facilitates



Portal for utilities bill payments is hard to navigate












No online portal for bus passes

Appendix D

## / SUGGESTED KPIs

## Appendix C

### Recommended KPIs

Operational Metrics		Strategic KPIs	
	<b>First Contact Resolution (FCR)</b> Percentage of customer inquiries resolved at the first point of contact.		<b>Customer Satisfaction Score</b> How satisfied citizens are with the city's customer service.
	<b>Average Handle Time</b> The average amount of time it takes for a CSR to handle a customer inquiry or issue.		<b>Customer Effort Score</b> How easily customers can interact with the City and get their issues resolved.
	<b>Service Level</b> The percentage of customer inquiries or issues that are resolved within a specific timeframe.		<b>Citizen Engagement</b> How actively citizens are engaged with the City, such as through attending community events, participating in surveys, or interacting with the City on social media.
	<b>Percentage of overdue cases</b> Requests still outstanding past a threshold (e.g., 20 days).		
	<b>Accuracy of Triage</b> How often do department contacts have to re-triage a customer to connect them with appropriate staff.		
	<b>Abandonment Rate</b> Percentage of customers who end interaction without resolution due to a breakdown in the process.		

