



## Staff Report

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**Report To:** General Government Committee

**Date of Meeting:** September 27, 2021

**Report Number:** CAO-009-21

**Submitted By:** Andrew C. Allison, CAO

**Resolution#:**

**Report Subject:** Centralized Customer Service Review

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### Recommendations:

1. That Report CAO-009-21 be received;
2. That Council endorse in principle the recommendations contained in the Centralized Customer Service Review prepared by CSPN dated September 21, 2021 (Attachment 1);
3. That staff be directed to review the recommendations contained in the CSPN Report and prepare an implementation plan to create a centralized customer service model;
4. That any net-new costs associated with the implementation plan shall require prior approval from Council; and
5. That staff be directed to respond in support of the letter from the Region of Durham dated August 11, 2021 (Attachment 2) to allow 311 calls made within Municipal boundaries to be routed to the Region, in an effort to address gaps in geographic exchange boundaries.

## Report Overview

Earlier this year, the Province of Ontario announced a second intake of the Audit and Accountability Fund (AAF). Clarington applied for and received funding to hire a third-party consultant to undertake a review of the external customer facing services that we deliver. An RFP was issued for the work, and Customer Services Professionals Network (CSPN) was awarded the contract.

This report seeks Council's endorsement of CSPN's recommendation that several of our current customer service touchpoints be centralized into a contact-centre/service-desk model. This would see services from several departments collapsed into one point of entry for the customer. The outcome would be a more effective and efficient customer journey and drive cost savings for the Municipality.

## 1. Background

- 1.1 In the first intake of the Province of Ontario's Audit and Accountability Fund, the Municipality applied for and were successful in obtaining funds to undertake an organizational structure review. As part of that review, Grant Thornton LLP, the consultant, recommended that a centralized customer service function be created (see Recommendation #10).
- 1.2 In Report [CAO-006-20](#), staff identified a path towards centralization and the need to review all the services that we currently provide our customers. This would have been a massive undertaking for existing staff, making the second round of the AAF a great opportunity to bring in a third-party customer service expert to undertake this work. Earlier this year, the Municipality applied for and received funding through the AAF. Staff drafted an RFP for the project, pulling from several other municipalities who have recently undergone customer service transformation initiatives. Customer Service Professional Network (CSPN) was the successful bidder.
- 1.3 The Municipality's funding agreement with the Province requires that a final report be submitted to the Province by October 15, 2021.
- 1.4 A key part of CSPN's engagement was undertaking a series of focus groups to ensure that there was an understanding of the key challenges and opportunities that Clarington customers face. The focus groups were: Community Groups and Associations, Commercial and Residential Developers, Business and Tourism, and Accessibility and Diversity. Staff also supported the public information gathering process by posting a customer survey that garnered 151 participant responses.
- 1.5 Several customer journey map exercises were undertaken, which provided an in-depth look at seven of our processes. This close lens on how we deliver these services shed

light on things we are doing well and areas where we can look to remove customer pain-points and find efficiencies.

- 1.6 The Region of Durham is also in the process of working towards a centralized customer service model. Staff and consultants representing the Region have met with Municipal staff to discuss the possibility for integration. More information is required to better understand what the Regional model will look like and their implementation timeline. CSPN did include this possibility as part of its report and interviewed Regional staff responsible for the file. As an early step towards making customer service more efficient within both Durham Region and Clarington, a letter (see Attachment 2) was received from the Regional CAO requesting that Clarington Council support adjusted call routing boundaries and have all local 311 dialing sent to them first.

## **2. Recommendations**

- 2.1 CSPN has essentially recommended that the Municipality centralize most of our customer services into one seamless corporate-wide centre called "Service Clarington." It was recommended that we create a single entry-point for all inquiries, including one phone number for calls, one consistent email address, an online customer self-serve portal and one centralized desk for in-person inquiries.
- 2.2 CSPN has recommended a three-stage implementation over five years. The stages contain a series of recommendations with potential financial investment, efficiencies and, more importantly, savings attached to each. The cost savings are associated mainly with process improvements, allowing staff to focus on more specialized work. CSPN's report also outlines which services will be fully or partially centralized and lists the services that need to stay decentralized, mainly because of their complexity or special qualification that staff need to complete the service.
- 2.3 The first stage of the recommended transition to a new Service Clarington model focuses on preparing for centralization with a timeframe of up to two years. It includes getting the Corporation ready by establishing a service strategy and implementing a set of consistent performance measures based on industry standards to assess our customer service. The first stage also focuses on greater inter-departmental collaboration, document, and knowledge sharing, as well as building service summaries to assist as we move toward the Service Clarington model. There is also a focus on technology and leveraging systems we already have in place. Specifically, using SharePoint to create a knowledge base of shared data to provide staff access to a streamlined source of information. As we prepare to centralize, the report also recommends that, in the interim, we utilize the Inquiry Portal - a GIS-based software created for Planning and Development Services to track customer inquiries. This system would help us consolidate our services as a first step toward centralization.

- 2.4 Stage two focuses on completing the activities outlined in stage one, as well as training and finalizing staff support for Service Clarington and confirming the list of services that will be included in the centralized framework. The consultant is recommending that Service Clarington reside in our Community Services Department, reporting to the Manager of Client Services and joining the dedicated Customer Service staff we already have in place. Service Clarington would be comprised of seven clerks – five full-time and two to three part-time. If we proceed with this model, we will not be hiring new staff for the full-time positions; instead, we will pivot staff in existing customer service clerk positions to form the new team. It's important to note that any future staff movement will be coordinated with the staff and departments affected to ensure a smooth transition that doesn't disrupt internal workflows.
- 2.5 The third stage focuses on adding more services to the centralized model and updating technology to further support Service Clarington as it grows. The third stage also considers a potential partnership with myDurham311 – a Region of Durham initiative to create a multi-channel service experience with the opportunity for area municipalities to join. The aim is to create a seamless service experience between Durham Region and other area municipalities. The Region plans to launch myDurham311 in 2023. The report recommends that we assess our level of centralization at the five-year mark and determine the best working relationship with a regional call centre.

### **Next Steps**

- 2.6 There is a considerable amount of information and detail contained within the CSPN Report that needs to be digested and further reviewed. Several Municipal staff have had a chance to do a preliminary analysis of the recommendations, but future consultation with affected Departments will be required to fully understand feasibility and potential costing. This work will begin immediately to stick with the proposed timeline for implementation, as outlined in the CSPN Report.

## **3. Concurrence**

This report has been reviewed by the Director of Community Services and the Director of Financial Services who concur with the recommendations.

## **4. Conclusion**

- 4.1 The final recommendations of CSPN call for a multi-year phasing in of a centralized customer service model, the basic premise of which is to consolidate similar existing business operations into one integrated group or function. The intended benefit of the consolidation is to (a) maximize resources; (b) improve the efficiency of existing operations through more streamlined internal processes; and (c) increase the service level provided to customers.

- 4.2 It is respectfully recommended that Council receive the CSPN Report and direct staff to begin implementation planning.

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Attachments:

Attachment 1 – Centralized Customer Service Review Report

Attachment 2 – Letter from Region of Durham CAO dated August 11, 2021 (Request for Resolution related to 311 calls using the Municipality of Clarington Telephone Exchange)

Interested Parties:

There are no interested parties to be notified of Council's decision.