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Municipality of Clarington  
**Centralized Customer Service Review**  
**Full Report**

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## Overview

### Project Context

The Municipality has undergone a Centralized Customer Service Review. The objective is to equip the Council and Senior Administration with a clear roadmap to implement a centralized service model and identify structural / operational improvements.

Specifically, the key focus of this review was to determine if the Municipality has opportunities through a centralized service model to:

- Improve services and outcomes – customer-focused services and delivery
- Improve service delivery mechanisms through greater operational integration
- Reduce costs for service delivery
- Improve process efficiency, and productivity
- Meet new or increased demands from customers

### Purpose of This Document

This report has been prepared for the management of the Municipality of Clarington. The development of the report includes a review of existing information from the Municipality as well as inputs from:

- Leadership / Management of In-Scope Services
- Public Survey (completed Summer 2021)
- Public and advisory Committee Focus-Groups
- Councillor Interviews
- CAO and Senior Leadership Team working sessions

The basic premise of a centralized service delivery model is to consolidate any existing business operations identical or similar that are conducted across multiple groups or departments into one integrated group or function. The intended benefit of this consolidation is to:

1. Maximize resources
2. Improve the efficiency of existing operations through streamlined processes
3. Increase the service level provided to customers

This report provides a summary of the services delivered by the Municipality and associated recommendations. The report includes the following information:

- An overview of findings from the current state to provide context to the recommendations
- The proposed recommendations, including more detailed information
- Implementation considerations to support the successful adoption of the recommendations
- An overview of financial implications associated with each recommendation
- A summary of the benefits of the recommendations

## **Core Assumptions**

The following assumptions have helped shape the research and analysis in this report:

- 2020 operating budget data provided by Finance and CAO office has been used to calculate benefits, including cost savings, efficiencies, and cost avoidance.
- Operational data provided by the respective departmental teams has been used to calculate benefits, including cost savings, efficiencies, and cost avoidance.
- Calculations for benefit estimates, efficiencies and cost avoidance analysis have been performed using input assumptions (found in Appendix IV) and data provided by the Municipality of Clarington Finance and the departmental teams.
- Inputs to the analysis are the sole responsibility of the management team. Inputs were pressure tested by the consultants.
- The analysis herein is in summary form. Selecting portions of this analysis without considering all of the factors in the larger context may create a misleading view of the output and results.
- Calculations have been based on specific assumptions noted in the Opportunity and Recommendation Details section in this report. Not every potential influence or factor has been considered, including, but not limited, to negotiated changes with contractors and unions, inflation, the impact of overhead costs, renovations costs for structural changes and changes in contractor rates resulting from changes in requirements.
- It is also important to note that data provided by Clarington for many assessments was high-level or not accessible.

## **Acknowledgement**

We would like to take the opportunity to acknowledge the assistance and cooperation provided by staff of the Municipality of Clarington and community stakeholders that participated in the development of the centralized service delivery review. We appreciate that reviews such as this require a substantial contribution of time and effort on the part of Municipal employees, and we would be remiss if we did not express our appreciation for the cooperation afforded to us.

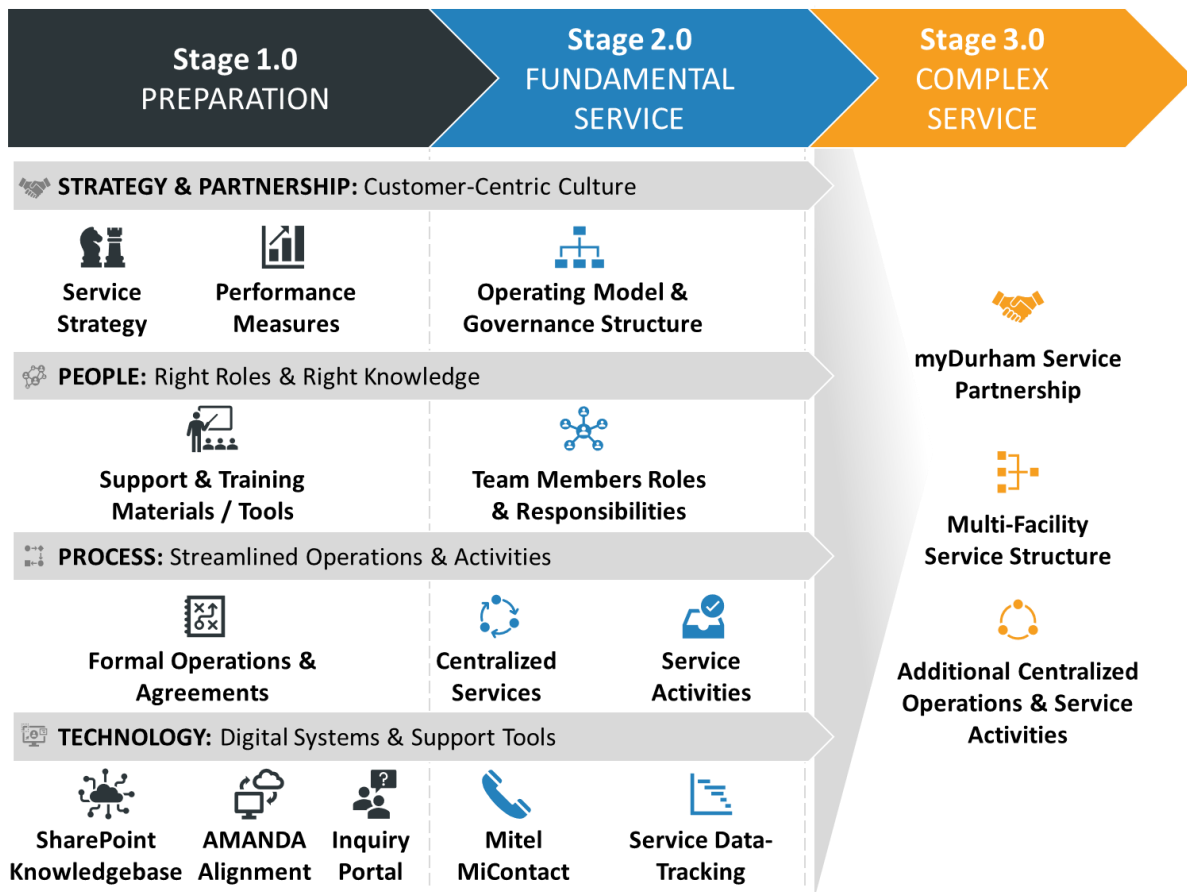
As the scope of our review is intended to focus on how Clarington can centralize and areas for potential efficiency improvements and/or cost reductions, we have not provided commentary on the numerous positive aspects of the Municipality's operations identified during the course of our review.

# Executive Summary

The objective of this report is to outline opportunities and recommendations on how the Municipality of Clarington can create a centralized service delivery model in order to 1) Increase efficiency and effectiveness of service delivery 2) Reduce costs through alternative service delivery approaches and 3) Standardize and track service levels across the organization.

## Introduction to the Clarington Centralization Framework

The centralized service delivery review uncovered 20 forward-looking recommendations that would enable Clarington to achieve the stated objectives. To support a scaled implementation of centralized service delivery, a “**Centralization Framework**” has been designed. The Framework includes a three-staged approach, spanning 5+ years to build and scale a centralized service model. An overview of the staged approach is detailed below:



### Stage 1.0 PREPARATION (0-2 Years)

- Setup organization & employees with the capability, knowledge and tools for success when centralizing structure / services.

### Stage 2.0 FUNDAMENTAL SERVICE (2-5 Years)

- Finalize details of preparation activities, train / onboard employees & rollout centralized service structure team & functions.

### Stage 3.0 EXPANSION (5+ Years)

- Scale centralization to increase the activities & complexity of services performed & update to greater technology automation / functionality for customers.

Within each of the Stages, opportunities and recommendations have been classified under four themes 1) **Strategy & Partnership** – *Customer-Centric Culture* 2) **People** – *Right Roles & Right Knowledge* 3) **Process** – *Streamlined Operations & Activities* 4) **Technology** – *Digital Systems & Support Tools*. For each of the associated opportunities and recommendations, cost to implement and expected cost / efficiency savings have been identified.

Below is a summary of opportunities by Stage:

Based on the identified opportunities and recommendations (mentioned above) to support a centralized service delivery model, 10 out of 20 (50) will drive savings for Clarington. Based on the ranges, Clarington can forecast to invest between \$210,000-\$620,000 to drive between \$500,000 and \$1,300,000 in savings. Further detail on how figures were calculated found in Appendix IV. **In addition to the cost savings associated with the recommendations, 60%-65% of the services reviewed will be impacted by a centralized service model that drives cost savings.**

Associated costs to implement and efficiency savings for each opportunity are captured below. Details on cost structure (e.g., internal vs. external) and guiding assumptions can be found in Appendix IV and within the Opportunities & Recommendations section.

“INT” cost to implement refers to the internal resources (sunk costs) that are required but will not be additional to existing operating budgets.

“TBD” cost to implement and efficiency / savings refers to resources that are unknown and dependent on decisions made from recommendations in this report.

## Stage 1.0 PREPARATION (0 – 2 Years)

	RECOMMENDATION	COST TO IMPLEMENT	COST / EFFICIENCY SAVING
S1	Create an Organizational “Service Excellence” Strategy	INT	N/A
S2	Define Organizational Service Level Standards & Metrics	\$0-\$10,000	N/A
S3	Implement Durham311 Telephone Exchange Agreement	N/A	\$0-\$10,000
R1	Develop Service Summaries for all Departments	INT	\$10,000-\$50K
R2	Create Support Materials, Guides, & Tools	INT	\$10,000-\$50K
P1	Create Process Maps for Service-Related Operations	\$10,000-\$50K	N/A
P2	Develop Formal Service Agreements for Impacted Departments	INT	N/A
T1	Align AMANDA Planning & Design to Centralized Service	\$10,000-\$50K	N/A
T2	Build SharePoint Site for Service Team	\$0-\$10,000	\$10,000-\$50K
T3	Leverage “Planning” Customer Inquiry Portal as Interim CRM System	INT	\$50,000-\$100K
T4	Deploy Data Tracking & Management for Centralized Service	\$10,000-\$50K	N/A
	<b>Estimated Stage Totals</b>	<b>\$30K-\$170K</b>	<b>\$80K-\$260K</b>

### Stage 2.0 FUNDAMENTAL SERVICE (2-5 Years)

	RECOMMENDATION	COST TO IMPLEMENT	COST / EFFICIENCY SAVING
S4	Operating Model of Centralized Service Team	\$10,000-\$50K	N/A
S5	Governance Structure of Centralized Service Team	\$50,000-\$100K	N/A
R3	Service Team Roles & Responsibilities	INT	N/A
R4	Skills & Knowledge of Cross-Trained Service Team Members	\$10,000-\$50K	\$10,000-\$50K
P3	Fundamental Services Performed through Centralization	N/A	\$160K-\$285K
T5	Modified Service Entry / Communication Channels for Centralized Service	\$10,000-\$50K	\$50,000-\$100K
	<b>Estimated Stage Totals</b>	<b>\$80,000-\$250,000</b>	<b>\$220,000-\$435,000</b>

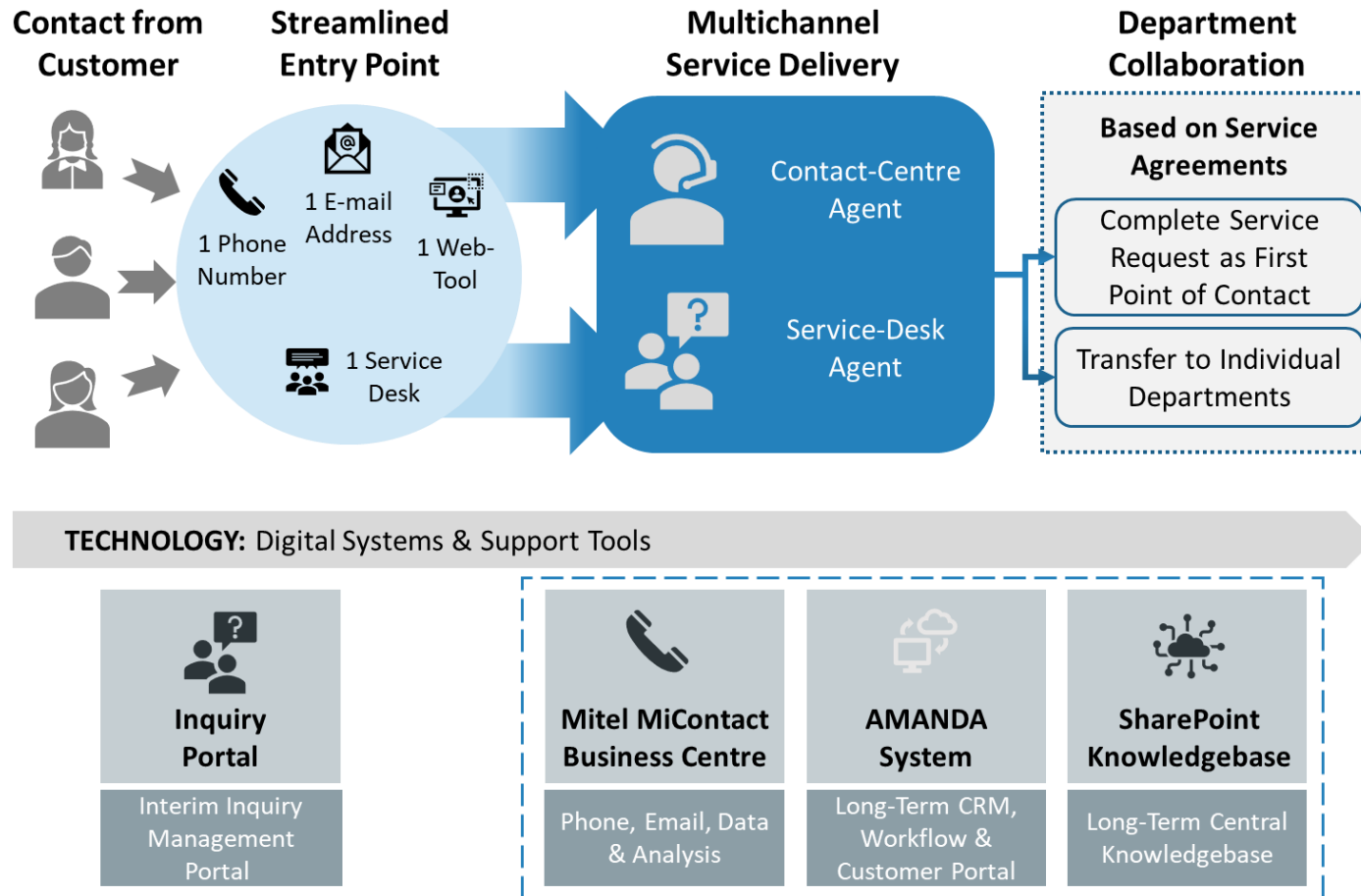
### Stage 3.0 EXPANSION (5+ Years)

	RECOMMENDATION	COST TO IMPLEMENT	COST / EFFICIENCY SAVING
S6	Perform Feasibility Assessment for myDurham Partnership Opportunities	TBD	TBD
P4	Complex Services Performed through Centralization	\$50,000-\$100K	\$100,000+
T6	Additional Self-Service Capabilities in Customer Portal	\$50,000-\$100K	\$100,000+
	<b>Estimated Stage Totals</b>	<b>\$100,000-\$200,000</b>	<b>\$200,000-\$335,000</b>



## Introduction to the Centralized Service Clarington Model

The opportunities and recommendations outlined above support the building of a centralized service team “**Service Clarington**”. These opportunities and recommendations will require future change within existing departments and services, existing operating models, and the current and planned technology solutions. At a high-level, a centralized service model for **Service Clarington** will look as follows:



## Impacted Clarington Departments and Services

Service Clarington front-line staff will manage customer service inquiries and requests on behalf of the following Clarington departments and services. Below is the table that outlines by department what services are recommended to be centralized. Cost savings have been provided as ranges.

**Based on the services reviewed, 60% - 65% will be impacted by a centralized service model that drives cost savings.**

### Key content found in the table includes:

- Department and Business Line
- Customer / Service Touchpoint
- **Centralized Service:** Service delivery model based on a single point of entry for all service requests (centralized service). In all scenarios, The Service Team acts as the first point of contact with the customer, however the level of responsibility to process the request varies by service and department. A detailed list of service and service processing responsibilities is summarized below.
  - **Full:** Centralized Service Team to own all customer interactions related to the service request. Individual departments do not need to process any service-related requests. The specific details will be defined in the Service Agreements for each department.
  - **Partial:** Centralized Service Team to share ownership of responsibilities to process customer service request. This could involve the Service Team working with a department SME to process a transaction or handing-off the transaction at a specific moment in the process. The specific details will be defined in the Service Agreements for each department.
  - **None:** Centralized Service Team does not perform any activities related to the processing of the service request. The Service Team would triage the request and pass it off immediately to the related department. The specific details will be defined in the Service Agreements for each department.

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
<b>OFFICE OF THE CAO</b>			
<i>Administration</i>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$5,000-\$10,000
Support & Coordinate Customer & Elected Officials in Resolving Complaints	Partial	3.0	\$10,000-\$20,000
<i>Communications</i>			
Design / Update Website functionality and Content	None	N / A	N / A
Manage Social Media Communications & Replies to Inquiries / Issues	Partial	3.0	\$5,000-\$10,000
<b>COMMUNITY SERVICES</b>			
<i>Facilities Services</i>			
Maintain & Prepare Facilities for Formal Bookings Made by Customers	None	N / A	N / A
<i>Recreational Services</i>			
Manage Resolution of Facility Complaints	Partial	3.0	\$20,000-\$30,000

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
Deliver Formal Programs / Activities within Recreation Facilities <i>Aquafit, Fitness Centre, Group Fitness Programs, Skating Programs, Specialty Programs, Swimming Programs, Camps, Leadership, Sports &amp; Active Play</i>	None	N / A	N / A
<b><i>Client Services</i></b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$10,000-\$20,000
Triage Incoming Inquires to Other Departments / Business Lines	Full	2.0	\$10,000-\$20,000
Manage Bookings and Registration for Programs / Services / Rentals <i>Recreation Classes, Fitness Memberships, Facility Rentals, Field / Ice</i>	Partial	2.0	\$15,000-\$25,000
Process Payments for Bookings & Registrations <i>Recreation Classes, Fitness Memberships, Facility Rentals, Field / Ice</i>	Partial	2.0	\$10,000-\$20,000
<i>Film Permitting</i>	None	N / A	N / A
Support Internal Teams with Coordination of Special / Corporate Events	None	N / A	N / A
Manage Application & Processing of Community Grants	None	N / A	N / A
<b>LEGISLATIVE SERVICES</b>			

DEPARTMENT	CENTRALIZE SERVICE	STAGE	ANNUAL COST SAVINGS
<b><i>Council Services (Clerk's)</i></b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$10,000-\$20,000
Process and Manage Approval of Departmental Permits / Licenses <ul style="list-style-type: none"> <li>• <i>Marriage License, Burial Permit / Death Registration, Pension / Life Certification, Lottery Licensing, Business Licensing</i></li> </ul>	Partial	2.0	\$5,000-\$10,000
Process and Manage Payments for Various Departmental Services	Partial	2.0	
<ul style="list-style-type: none"> <li>• <i>Licenses, Parking Tickets, Parking Permits</i></li> </ul>	Full	2.0	\$20,000-\$30,000
<ul style="list-style-type: none"> <li>• <i>FOI/MFIPPA Request, Cemeteries (5)</i></li> </ul>	None	N / A	N / A
Perform Civil Marriage Ceremonies	None	N / A	N / A
Provide Commissioner of Oaths Services	None	N / A	N / A
Support Cross-Departmental Inquiries and Provide Requested Info / Docs	None	N / A	N / A
<b><i>Municipal Law Enforcement</i></b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	\$10,000-\$20,000
Manage Resolution of Bylaw Related Complaints	None	N / A	N / A

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
Process and Manage Approval of Permits / Licenses <ul style="list-style-type: none"> <li><i>Refreshment Vehicles, Auctioneer's License Peddler License, Sign Companies, Vehicle for Hire, Burning Permit, Fireworks Permit, Parking Permit, Sign Permit, Special Events Permit, Kennel License</i></li> </ul>	None	N / A	N / A
<b>Animal Services</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$5,000-\$10,000
Manage Resolution of Departmental Complaints	Partial	3.0	\$0-\$5,000
Process and Manage Approval of and Animal Licenses	Partial	3.0	\$0-\$5,000
<b>FINANCIAL SERVICES</b>			
<b>Taxation</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$20,000-\$30,000
Manage Resolution of Departmental Complaints	Partial	3.0	\$10,000-\$20,000
Complete and Manage Customer Payments of Property Taxes	Partial	2.0	\$20,000-\$30,000
<b>Information Technology</b>			

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
Lead / Coordinate the Design, Build, Implementation of AMANDA Initiative	None	N / A	N / A
<b>PUBLIC WORKS</b>			
<b>Operations</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	\$10,000-\$20,000
Manage Resolution of Departmental Complaints	Partial	3.0	\$10,000-\$20,000
Process and Manage Approval of Permits / Licenses <ul style="list-style-type: none"> <li>Road Entrance, Road Occupancy</li> </ul>	None	N / A	N / A
Manage Maintenance of Roads & Parks (Seasonal Grass Cutting)	None	N / A	N / A
Manage Maintenance of Sidewalks (Seasonal Snow Removal)	None	N / A	N / A
<b>PLANNING &amp; DEVELOPMENT SERVICES</b>			
<b>Community Planning &amp; Design</b>			
Process and Manage Review of Commercial Development Applications	None	N / A	N / A
<b>Development Review</b>			

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	\$10,000-\$20,000
Manage Review & Sign-Off for Zoning / Land-Use Aspect of Permit Approval	None	N / A	N / A
<b>Special Projects</b>			
Support Internal Permit Approval Process with Employees	None	N / A	N / A
<b>Building Permit &amp; Inspection</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	\$5,000-\$10,000
Process and Manage Approval of Construction Related Permits <ul style="list-style-type: none"> <li>• Deck, Fence, Pool Enclosure, Shed, Sign</li> </ul>	Partial	3.0	\$15,000-\$25,000
Perform Building, Structural, Plumbing, HVAC Inspections	None	N / A	N / A
<b>EMERGENCY &amp; FIRE SERVICES</b>			
<b>Fire Suppression</b>			
Provide Emergency Services in Response to Calls from Public	None	N / A	N / A
<b>Fire Prevention</b>			
Provide Information and Support to General Inquiries / Issues from Public	Partial	2.0	\$10,000-\$20,000



<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>ANNUAL COST SAVINGS</b>
Facilitate Educational Programs and Events to Public	None	N / A	N / A
Perform and Manage Fire Inspections for Permit Approval	None	N / A	N / A

## **Centralization Operating Model Details**

The governance structure and operating logistics of Service Clarington will include:

### **I. Governance**

The Service Clarington team will be incorporated into the Community Services department and include the following roles in Stage 2.0:

- 1 Director , Community Services (Existing)
- 1 Manager, Community Services (Existing)
- 1 Customer Service Coordinator (Existing)
- 7 Clerks (5 FT and 2-3 PT) – All FT Existing, 1 PT Existing)

Note in Stage 3.0 the addition of 1-2 Clerk II Roles from existing departments is suggested to be included within the Service Clarington team.

### **II. Operating Service Desk**

A Centralized Service Desk will be established to manage initial customer contact:

- Overview: General walk-in customer support for identified Stage 2.0 centralized services.
- Location: Municipal Administrative Centre (Existing Desk in Lobby).
- Operating Hours: Monday – Friday (8:30am – 4:30pm).
- Service Channels:
  - Service Desk – physical location for in-person service to customers.
  - Phone - one external number available to customers.
  - E-mail - one external address / inbox available to customers.
- Resources: Coverage for the Service Desk is recommended to include 2 Full-Time, Cross-Trained Clerks Available During Operating Hours

### **III. Centralized Contact Centre**

General in-bound service support for all departments across the Municipality.

- Location: Garnet B. Rickard Recreation Complex.
- Operating Hours:
  - Monday – Friday (7:00am – 8:00pm).
  - Saturday – Sunday (8:00am – 4:00pm).
- Channels:
  - Phone - one external number available to customers.
  - E-mail - one external address / inbox available to customers.
  - Web-Tool – online submission-form available to customers.
- Resources: 3 Full-Time, Cross-Trained Clerks Available During Business Hours. 2 Part-Time, Cross-Trained Clerks Available After Business Hours.

Note: It is recommended that a single email address (e.g., info@clarington.net) is aligned to a shared inbox accessible by both the service desk and contact centre. Features within the Mitel MiConnect Business Centre email feature support functions like group email management, collision detection, automated emails and insights and analytics. This streamlined approach will ensure only one email address is shared to the

public, but resources at both service locations can view, access, and manage customer inquiries collectively as a broader team (regardless of physical location).

## **Technology**

Successful delivery of services through the centralized model will require the right technology. It is recommended that the Municipality leverage the AMANDA tool to act as a workflow management system, CRM, and customer portal (Note: expansion of current build scope required to meet central service delivery requirements). In the interim and while AMANDA is under development, the Inquiry Portal can be leveraged (expansion of capabilities required). SharePoint should be used as the knowledgebase tool with the assumption that clear standard operating procedures are documented. Both systems can integrate into AMANDA. Mitel MiContact Business Centre should continue to be used as the phone system. Expansion of Mitel services to include Insight and Reports as well as email management is recommended.

## **The Benefits of a Centralized Service Center**

The recommended centralized service model for the Municipality will result in many benefits to the organization. In the design of the recommendations, which make up the components to the centralized model, we have identified unique benefits for each. However, across all recommendations outlined in Stages 1, 2 and 3, the major benefits can be categorized as follows:

- **Economies of scale per-transaction:** number of calls, emails, web inquiries.
- **Improved customer communication:** a centralized location offers a single point of contact for customers, who can be transferred to the appropriate department for service, if required.
- **Improved management and supervision:** one manager can easily supervise and mentor many more employees through a centralized model to ensure consistency of service provided.
- **Improved quality of staff training:** a centralized training program for all Service Team staff will ensure training is consistent and valuable, leading to better customer experiences.
- **Improved analytics and error reduction:** a centralized location makes it easier to gather data for analysis, and to address errors and other issues quickly.

## Centralized Customer Service Best-Practices

As the Municipality seeks to centralize its customer service, the consultant team has engaged in exploratory research methodologies, which included document reviews, interviews, focus groups and surveys. Insights from these activities helped the team gain clarity of Clarington's internal / external customer service practices. Findings are used to guide development of the centralized service model.

The following section outlines the research approach and provides context in which the centralized service review was conducted.

### Strategic Service Themes

The Municipality's customer service landscape is siloed in terms of how services are accessed by customers and delivered by the organization. The consultants identified four Strategic Themes aligned to the Municipal service landscape to create a structured approach to review and assess the opportunity for centralized customer service. Each strategic theme dissects parts of the service to help identify where common challenges might occur.

This organized approach is used to ensure research is comprehensive and captures all important information. Findings are categorized, diagnosed, and support the identification and prioritization of future insights. The Themes are also utilized to structure the recommendations towards efficient, centralized services for Clarington.

Themes have been assessed based on different perspectives relevant to services, including:

1. The Internal Perspective of the Employees and the Organization
2. The External Perspective of the Customer and the Community, and
3. The Best-Practice Perspective of Comparable Municipalities.

### Strategy & Partnership: Customer-Centric Culture

- How does the Municipality develop & manage customer-focused Strategic Initiatives?
- This includes clearly articulated and/or documented service level expectations that are regularly reported on and communicated.

### People: Right Roles & Right Knowledge

- How does the Municipality mobilize "Human" resources to drive great Customer Service?
- This includes the governance structure, roles, responsibilities, and the accountability for clear, effective decision making for efficient service delivery.

### Process: Streamlined Operations & Activities

- How does the Municipality structure services & processes to deliver on Service needs?
- This means processes are well designed and defined, effective and efficient. Gain understanding of where processes do not exist or need updating as well as what tools are currently leveraged.

## Technology: Digital Systems & Support Tools

- How does Digital and Technology systems support the delivery & interaction of Services?
- This means appropriate technology is in place to enable processes and service delivery more broadly.

## Clarington Jobs-to-be-Done Methodology

To understand the service experience and identify which services to centralize, it is important to define what the customer is trying to achieve. The customer-centric approach and methodology used to do this is called the “**Jobs-To-Be-Done**” method. A “job” is the customers’ purpose and what they want to get out of the service interaction with Clarington. The goal is to uncover both the operational and people side of these service experiences through the lens of the “job” the customer is trying to complete.

The “jobs-to-be-done” approach identifies how the services are being used from the customer point-of-view and what outcomes they are trying to achieve. This service review methodology uncovers more than the operations of the service experience. It identifies customer motivations and “drivers” of behaviour. These combined operational and customer insights help to identify what services to centralize to create a consistent, positive experience.

By analyzing services through the ‘jobs-to-be-done’ categories, areas of service centralization become clear. Similar “jobs” customers are trying to complete across multiple departments are activities that can be centralized / streamlined. The centralization of these activities will reduce waste / duplication across the organization and result in better customer experiences.

The four (4) key jobs-to-be-done identified for this service review are outlined below. It is important to note that not all “jobs” or interactions with customers are suitable to be addressed by the centralized service team. Within this report, we provide guidance on service level agreements (SLAs) appropriate for the hand-off of service inquiries, purchases / payments, approvals / permissions and use of service offerings suitable for a generalist service Clerk role.

The four (4) key jobs are:

**Address an Issue / Inquiry:** This job occurs when an individual contacts the Municipality to ask for clarification, get help / support, or make a complaint.

**Make a Purchase / Payment:** This job occurs when an individual seeks to buy / pay for something such as tax payment, membership fee, permit fee, etc.

**Get Approved / Permission:** This job occurs when an individual seeks approval or permission for a task/event, such as Licenses, Permits, Certifications, etc.

**Use a Service / Offering:** This job occurs when an individual utilizes a service or offering from the Municipality such as fitness / recreation classes, events, etc.

## Centralized Customer Service Guiding Principles

A centralized service model will enable Clarington to develop a front-line centre of excellence for handling customer service needs, while leveraging back-office service workflows. There are many variations and models to service centralization; however, there are Guiding Principles of service centralization to assist Clarington with moving through the transformation.

Guiding Principle	Goals Addressed
<b>Create a dedicated customer service function and transfer customer service workload from departments</b>	<ul style="list-style-type: none"> <li>• Consistent experience</li> <li>• Provide services cost-effectively</li> <li>• Get to the right person quickly</li> </ul>
<b>Enable the function to address phone, in person, email and online portal</b>	<ul style="list-style-type: none"> <li>• Simplify access</li> <li>• Consistent experience</li> </ul>
<b>Define new customer service positions</b>	<ul style="list-style-type: none"> <li>• Consistent experience</li> </ul>
<b>Redesign customer service processes</b>	<ul style="list-style-type: none"> <li>• Consistent experience</li> </ul>
<b>Define service Key Performance Indicators (KPI's)</b>	<ul style="list-style-type: none"> <li>• Define clear service levels</li> <li>• Design service around customer needs</li> </ul>
<b>Leverage an integrated technology tool to better manage customer processes</b>	<ul style="list-style-type: none"> <li>• Modernize interaction tools</li> <li>• Centralize customer information</li> <li>• Digitize more services</li> </ul>
<b>Leverage a shared knowledge base for all staff</b>	<ul style="list-style-type: none"> <li>• Consistent, efficient answers to customers from all staff</li> </ul>
<b>Organize the design of workflow IT tools and service centralization</b>	<ul style="list-style-type: none"> <li>• Streamline service teams ability to execute the workflows</li> <li>• Enable service teams accessibility to functions and information</li> </ul>

# Clarington External Service Landscape

## Comparable Municipality Findings

The external review looked at five comparable public sector peer municipalities to examine best practices. Insights from this analysis uncovered key lessons to support Clarington in aligning its customer service approach with a tested model. The findings are organized by the previously defined Strategic Service Themes of Strategy & Partnership, People, Process, and Technology.

### Strategy & Partnership: A Customer-Focused Mindset

Many peer municipalities develop customer service strategies that help guide all organizational customer service efforts. A Customer Service Strategy defines an organization's vision for how customer service is delivered. This often incorporates a vision statement, core values, and guiding principles that help define and guide what service "success" looks like.

For example, the Town of Whitby and the Municipality of Caledon both began their centralized customer service transformation with the creation of a Customer Service Strategy. Each strategy consists of a vision and guiding principles/objectives. For the Town of Whitby, their customer service initiative is embedded within their Corporate Strategic plan.

#### The Town of Whitby Customer Service Vision

In order to fulfill their mission, vision, and core values, their Corporate Strategic plan identifies three key priorities with detailed objectives: (1) People, (2) Organization, and (3) **Customer**. The guiding objectives outlined for the **Customer** priority are as follows:

We will provide a consistent, optimized, and positive customer service experience. Our objectives to achieve this priority include:

- Design service delivery around customer needs
- Define clear service levels
- Modernize and improve customer interaction tools
- Provide consistent customer service training for all staff

Measure results in pursuit of ongoing improvements to the customer service experience  
(Note: Customer is defined as both external and internal)

### People: Right Roles & Right Knowledge

Organizational change impacts every employee within the organization. Centralization of customer service functions often requires the transfer of employees into a new service-oriented role or department. This restructuring has implications and often requires additional training and skill development. Service Caledon's customer service transformation understood the importance / implication of employees in centralized

service and have outlined their successes and lessons learned from their recent implementation of a centralized service team.

### **The Municipality of Caledon (Service Caledon) - Spotlight**

#### Employee Skills & Knowledge for Centralization

The Service Caledon initiative required the creation of specific centralized customer service roles within the new business unit. As each department's general customer service activities were onboarded into the centralized function, an employee of that department would also be onboarded as the "Subject Matter Expert". Key best practices include, **Service Caledon staff were cross-trained, Centralized customer service roles vary from departmental service roles, and define the skills needed as not every employee is suited for or willing to transition.**

#### **Process: Streamlined Activities**

Centralization aims to simplify and streamline processes for enhanced efficiency of service. A common pain point in decentralized service is multiple entry points of contact, which result in increased transfers and duplicated efforts. Service Caledon implemented two changes to reduce this pain point:

### **The Municipality of Caledon (Service Caledon) - Spotlight**

#### Service Structure & Operations for Centralization

- Positioned Service Caledon desk at the front door of Town Hall to create a streamlined, 'one-stop' service area as the first point of contact. Residents who enter Town Hall first approach the service desk and are directed to the correct area.
- Simplified telephony system by modifying the switchboard function to only 3 options: Dial extension, search directory, or speak with Service Caledon. Restricting customer entry points has had a significant impact on decreasing transfers and "wrong" hand-offs of customers

#### **Technology: Digital Systems & Support Tools**

Technology is a core enabler of centralization, yet large scale technology transformations are not always necessary or feasible right away. Peer municipalities have engaged in their service centralization initiatives with similar legacy IT infrastructure systems that Clarington currently uses. Comparable municipalities have said that they have not implemented technology updates in the centralization process due to a lack of clearly defined internal processes and service policies / procedures. Highlighted below are the main technology systems Caledon utilizes. It is important to note that Caledon has been successful with their customer service initiative with minimal technology changes and/or purchases of new technology stacks. This is similar to the current state of Clarington's IT landscape.

### **The Municipality of Caledon - Spotlight**

#### Related Service Technology List

- AMANDA



- Vailtech
- CityWide
- Great Plains
- Mitel Phone System
- SharePoint

In addition to the detailed review of the Municipality of Caledon and Town of Whitby, we conducted a high-level scan of other comparable municipalities (City of Mississauga, City of London, City of Brampton, Regional Municipality of York). Below are key themes from services reviewed:

1. **Willingness to Collaborate and Consistent Commitment to Service Excellence** – Stakeholders across multiple municipalities who are responsible for the delivery of services recognized the need to ensure that services are delivered efficiently and effectively. This included an openness to explore opportunities to collaborate with peer municipalities to bring better outcomes or value to residents. For many municipalities, despite having disparate customer service systems, it was noted that service representatives are customer service oriented and provide effective service levels with their current systems and tools. This aligns with the sentiment heard from staff at the Municipality of Clarington.
2. **Non-Standardized Service Training** – For many of the smaller municipalities, there is no formal customer service training, which was seen as a problem for driving change. This coupled with the informal customer service standards could impact the consistency and quality of services.
3. **Lean Staffing Levels with some Staff Wearing Multiple Hats** – There was a recognition that staff, generally speaking, are very dedicated and committed to providing high-quality services that respond to residents' needs and co-workers. Staff resource constraints were consistently referenced as a limitation to service delivery across many municipalities. Staff often had responsibilities that spanned multiple services/functions with many corporate services decentralized. In some cases, this has also resulted in the duplication of services across multiple departments within a municipality without clear centralization of service expertise. Clarington has an opportunity to maintain current staffing levels but re-locate individuals into the centralized service team as full-time or part-time positions.
4. **Limited Collection of Metrics or Data** – Across many municipalities, there is a clear opportunity to improve data collection and its use in decision making moving forward. Limited examples of KPI's or performance data are available. Similarly, Clarington has an opportunity to define KPI's and create consistent tracking and communication processes.
5. **Manual, Paper-Driven Processes** - A number of service requests (specifically counter services) are delivered through manual, paper-driven processes that do not enable efficient or effective tracking of customer interactions and/or service delivery. Paper-driven processes typically result in duplication of effort, missing or incorrect information, increased travel time to share information, and increased costs (e.g., printing, mail). The team uncovered similar instances within Clarington when building the Customer Journey Maps.

6. **Municipalities are Independently Procuring Similar Services with Limited Coordination** – Municipalities engage third-party vendors to support service delivery – both internally and to the community. In many cases, this is a more effective delivery method than maintaining costly in-house expertise for low-volume activities. As myDurham311 (details on MyDurham311 can be found on page 23) launches and expands in the future, Clarington should re-assess the opportunity for integration into a broader, cross-Municipality centralized service model.
7. **Technology Investments to Support Digital Service Delivery** - Other comparable jurisdictions are making investments in increasing the use of online portals for licensing applications to improve customer experience and reduce the amount of manual and paper-based work. Online license applications and renewals are increasingly common in comparable municipalities and have resulted in productivity improvements. For example:
  - Mississauga has created a portal to allow marriage licenses to be submitted online, which reduced processing times by approximately 10 minutes per license. The Municipality currently has this functionality.
  - London allows building permits to be submitted online
  - Markham allows for renewal of business, marriage, and pet licenses online (the Municipality has this functionality).

## Customer Experience Findings

To help inform the customer service review, the consulting team used several research methods to gather input on the external customer experience. Several focus groups were held with different external stakeholder groups to uncover sentiments on the current service experience and future expectations. A survey was also conducted to capture data and information from Clarington residents. In addition, interviews with Councillors were held to better understand future planning requirements for Clarington and customer service at the Municipality, particularly residents' views on it.

Below are the main themes that were uncovered within the research activities.

### Focus Groups

Four (4) focus groups of 5-10 participants were conducted with different external stakeholders. Focus group activities followed a semi-structured discussion design, where participants were asked about their preferences and experiences when interacting with the Municipality of Clarington. The activities and questions were tailored for each group to gather targeted insights.

### Community & Association

The Community Group consists of three (3) associations that are classified as recreational sporting organizations. The common themes that emerged from the discussion include:

#### Challenges with internal communication

- Internal communication within the Municipality impacts how services are received. When inconsistent, the communication creates more confusion within the process, redundant calls to the Municipality, and long wait times to receive an answer to inquiries.

#### Desire for greater transparency

- Transparency within the service lines and how services are delivered helps manage customer expectations. Untimely or inconsistent updates when process changes occur (i.e., payment methods) causes frustration.

#### Preference for a customer-centric service approach

- Community Groups value a customer-centric approach to the management and booking of fields. Increased flexibility and timeliness of issue resolution is particularly important. (i.e., field / ice switching and / or maintenance).

### **Commercial & Residential Developer**

The Developer Group consists of residential and commercial businesses. The common themes that emerged from this discussion include:

#### Desire for partnership

- Relationships with developer groups are long term and ongoing. Developers desire a sense of partnership and collaboration with the Municipality - with both parties working towards the same goals.

#### Managing time-sensitive projects

- Many projects can be significantly impacted by delays and require careful management of time and effort. Consistent and transparent processes help manage expectations to facilitate a smooth experience.

#### Varying needs among customer groups

- There are varying needs among customers who are deploying a large development and those who are taking on small renovations (on behalf of themselves or a client). Yet, the process is the same regardless of complexity. This often results in small projects having an extended wait time.

### **Business & Tourism**

The Business Group consists of stakeholders focused on economic development and tourism within the municipality. The common themes that emerged from the discussion include:

#### Desire for partnership

- Business leaders believe Clarington has a lot to offer with potential for further economic growth. There is a desire to have more collaboration with the

Municipality to achieve these goals. Currently, the Municipality outsources economic development to CBOT.

Urgency on upcoming opportunities

- Upcoming media opportunities and events to promote businesses are time sensitive. The urgency of the request requires prompt input from the Municipality. This can often be a challenge given disjointed communication across departments who are required to process requests.

More resources for small businesses

- Smaller and local businesses are at the core of the Municipality's culture and economy. More resources and support are essential and requested by this group.

### **Accessibility & Diversity**

The Accessibility & Diversity Group consists of subject matter experts in the field. The common themes that emerged from the discussion include:

Need for more representation

- As Clarington's population grows, it is becoming more culturally diverse and this needs to be represented in the services Clarington provides, such as events, recreation, and recognition of inclusive language / cultural needs.

Councillors impact the communities

- Councillor engagement within communities and neighbourhoods enhance the feelings of inclusivity and a community-focused culture.

Current initiatives are well recognized

- The Diversity and Accessibility Committees within Clarington are focused on inclusive initiatives such as the "Language Line" to help overcome language barriers when contacting the Municipality.

### **Digital Mass-Survey**

The survey conducted focused on customer insights and gathered residents' perspectives regarding Municipal customer service. The survey data analyzed is based on 151 participant responses with a response completion rate of 98.6%. Further detail into the design and administration of the survey can be found in Appendix B.

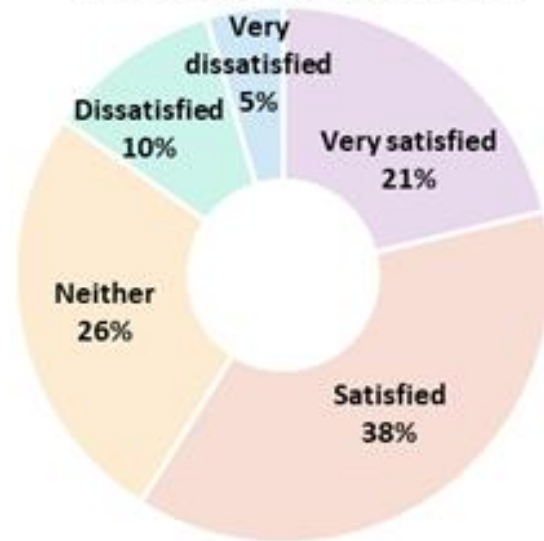
Some of the key findings and themes include:

- Generally customers utilize services at the Municipality monthly
- Overall, residents are generally satisfied with the services they access.
- In general, residents want services that are simple and easy to use.
- Residents require courteous and professional service, which includes accountability and follow-up on issues to ensure a positive experience

## WHAT IS MOST IMPORTANT TO YOU?



## HOW SATISFIED ARE YOU?



*\*Complete Survey Results found in Appendix II*

Respondents also identified challenges in the current service delivery experience which are relevant to centralization. These include:

- Difficulty in communicating with the Municipality – inaccessible teams / staff
- Frustration from lack of returned calls and follow up on complaints
- Lengthy resolution times
- Lack of transparency in service processes
- Poor self-serve / accessibility options, unable to access information and complete tasks online

# Clarington Internal Service Landscape

A detailed review of the Municipality of Clarington is conducted through internal interviews and workshops with staff. Insights from these sessions have informed the recommendations for centralization and service improvement initiatives. Findings for centralization have been analyzed at the Corporate-wide level and departmental level.

## Corporate-Wide Service Elements Impacting Centralization

### Service Partnerships

As Clarington develops its service centralization strategy, there is an opportunity to partner with the Region of Durham to leverage the centralized myDurham311 model. Using this new region-wide model, surrounding municipalities will have the option to leverage operations and digital tools to deliver customer service programs / services.

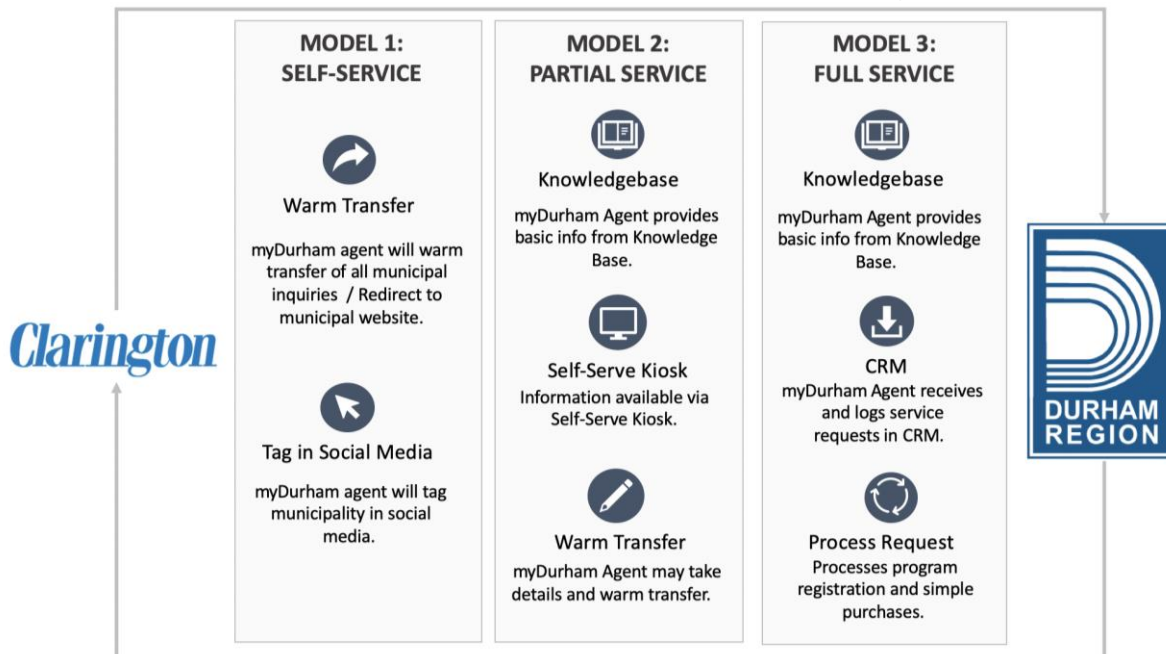
Durham Region processes more than one-million transactions annually through multiple channels, across 80 front desks, 28 call centers and 18 social media accounts.

The myDurham311 project looks to:

- Provide a clear point of contact, regardless of how customers choose to interact
- Provide more options to complete transactions
- Bring greater ease of access to services by extended hours/self-service channel
- Deliver a consistent, convenient, and personalized service

Through Regional and Municipal collaboration, employees and customers will benefit from an omnichannel experience with a “triage-like” system that will assist in minimizing time, effort and challenges when resolving calls. Service Durham has options that municipalities can choose and proposes three service models for implementation.

The myDurham 311 model can be summarized within the following schematic.



myDurham311 is projected to launch in August 2023. At that time, the Region will integrate individual municipalities if desired. As shown above, the Region hopes to partner with all municipalities at varying degrees of involvement based on (1) a self-service approach with a warm transfer or redirect of the call to Clarington in a positive and friendly manner; (2) a partial service approach with an 'enhanced warm transfer' where service request details may be taken and transitioned into the Municipalities systems; and (3) a full-service approach where the Municipality is a part of the Region's service structure.

By mid-October 2021, the Region will ask the municipalities to provide their level of interest in the program and their desired degree of integration. If Clarington chooses Model 3, the Region will require a detailed report of the current service landscape in the Municipality. This would include providing data, including the amount and complexity of calls the municipality receives, the subject matter of the calls, current staffing levels, etc. In addition, municipalities will be given the option to leverage the Regional Customer Relationship Management (CRM) and Knowledgebase.

### **Key Considerations Relevant for Centralization:**

Much of the value in the partnership comes from the functionality of the digital tools and contact centre capabilities myDurham311 will have. The partnership would enable Clarington to replace legacy systems and access new systems that do not currently exist. However, this is not a significant benefit in the short-term because of the major digital transformation taking place with the AMANDA System and roll-out of SharePoint for a knowledgebase.

The new AMANDA system has the overall capability to provide Clarington with similar functionality as myDurham including:

- Automation of some manual activities – improving efficiency.
- Reduction of routine calls to skilled workers – increasing productivity
- Automation of high-frequency tasks – reducing errors
- Streamline of processes through workflow tools– improving collaboration
- Alignment of activity to employee skill level – minimizing undervalued effort of skilled workers
- Improves integration with department systems – increasing knowledge sharing

The current plan for the design of AMANDA does not include all of the functions at the level of sophistication expected from the myDurham partnership. However, this is likely not required for Clarington to be successful in the delivery of centralized service. The benefits listed above will allow Clarington to reach their goals for service delivery in the short-term.

Given the large capital investment currently being made in AMANDA and the Municipality's short-term service needs, the recommendation is not to partner with myDurham311 right now at any level. Clarington has the internal capabilities to deliver centralized service by leveraging existing internal technology – AMANDA, SharePoint, Mitel, Inquiry Portal, etc. However, as customer service needs evolve and internal capabilities change, revisiting the partnership opportunity in Stage 3.0 is recommended. This phased approach to assessing partnership validity will enable Clarington to deploy

a centralized service team faster, leverage synergies with current technology builds internally and pilot the proposed delivery model to determine what (if any) changes are required for the future.

## **Customer-Facing Service Delivery Roles**

Understanding the customer-facing service roles in Clarington is essential to leverage existing employees correctly and efficiently during the centralization process. Currently, customer-facing service delivery roles within the Municipality are diverse, having many governance / role specifications.

The key customer service roles include:

- Clerks (I & II): Specialize, department-specific subject matter expertise
- Customer Service Representatives (Lead / CSR): Responsible for the oversight of customer-facing services within the facilities. The Clerical roles can often include more specialized subject matter expertise for their departments

### **Key Considerations Relevant for Centralization:**

#### **Governance**

- Organizational structure of service-related roles varies. CSR positions are located within the facilities, whereas Clerks are located within each department in which they serve (including a Communications Information Clerk located at Town Hall)
- The governance of CSRs and Clerks is separately managed and determined by each department. This results in multiple reporting structures and varying service expectations
- Siloed governance of staff that provide service functions results in inconsistent service experiences and disjointed communication of service-related changes across the organization

#### **Role Requirements**

- Role requirements for CSRs and Clerks vary across departments. There are similar tasks completed by CSR and Clerk staff within the Community Services department, however this is not consistent across teams. Information on role divisibility has not been defined at an organizational level or is readily known by all staff involved
- CSRs and Clerks have some overlap in job requirements; however, execution of complex interactions requires specialized knowledge held by Clerks. For example, both roles engage in the management of registrations and bookings, yet there are unique tasks that Clerical staff must oversee (i.e., cancellation of registration). Clerks that provide their services within a department are subject-matter experts in that context. They possess up-to-date working knowledge on key processes / interactions. In a centralized model, the generalist service team would need to be cross trained on the high-level service interactions that could



be completed through first line of defense, and know when to triage the inquiry, payment, complaint, or service requirement to the SME.

**Unionized Workforce**

- Employment type for service-related employees vary amongst full-time and part-time staff. Most full-time Clarington employees are a part of a collective bargaining unit, except those in Management roles. Typically, full-time service roles fall under this agreement, and part-time roles do not.
- The re-design of roles to align to the centralized service model will need to account for employment requirements. Potential role modifications and/or changes follow an established Corporate process and are subject to negotiations as set out during collective bargaining. There may be the potential for role changes to be reviewed with the Pay Equity Committee.

**Service Delivery Performance Measurements**

While the Municipality has defined service performance metrics, they are not currently utilized. Across the in-scope services, stakeholders identified limitations in the collection, review, and analysis of data and information due to technology limitations and staff capacity constraints. The Municipality’s current state has not relied upon the use of data or rigor (consistency and application of data) in processes to drive decision making. Note, this should not be considered a criticism against staff as many staff and leadership members made comments expressing a desire to move in this direction.

There is a potential opportunity to use data better to track service levels and support a culture and framework of continuous improvement and innovation. The successful implementation of a more robust Reporting Framework would provide the Municipality with increased visibility, understanding, and oversight into services’ performance and support better planning and resource management.

To help the Municipality track valuable service data, service performance measurements aligned to two categories should be collected: 1) Operational Service Standards and 2) Customer Experience Metrics.

The following key measurements are prioritized and should be incorporated into Centralized Services. Below is an outline of service standards Clarington should be collecting.

**Operational Service Standards**

Name	Description
<b>FTR:</b> First-Touch Resolution Rate	The number of tickets / cases / inquiries that are handled and “resolved / closed” by the first agent during their first interaction.
<b>ART:</b> Average Resolution Time	The total time that is taken by the support team to solve the issue once it is looked upon.
<b>IPR:</b> Interactions Per Resolution	The number of interactions the support agent and the customer have about a single issue before coming to a resolution.

Name	Description
<b>FRT:</b> First-Response Time	The time it takes from when a customer makes a request to the time an agent "picks up / opens" the ticket / case / inquiry.
<b>AIT:</b> Average Idle Time	The time a ticket / case / inquiry spends in some form of an "open status", not including any waiting for the customer to respond.
<b>ABR:</b> Abandon Rate	The number of calls "abandoned / hung-up" while a customer was waiting on hold to connect with a human agent.

### Customer Experience Metrics

Name	Description
<b>NPS:</b> Net-Promoter Score	Measures the level of loyalty customers feel towards the organization by uncovering how likely they are to recommend to someone else
<b>CSAT:</b> Customer Satisfaction Score	Measures the general positivity / satisfaction customers have with the organization as a whole or any individual aspect
<b>CES:</b> Customer Effort Score	Measures the level of effort / simplicity customers experience when interacting with the organization or services
<b>CIP:</b> Customer Interaction Preferences	Measures the general preferences customers have when interacting with the organization and /or services (i.e., what channels they use, when they interact, what they want to complete, what the value)

### Service & Organizational Information Technology (IT) Tools

Rapid technological innovation is a key trend impacting municipalities across Ontario. As technology continues to expand into everyday business processes, organizations are becoming more dependent on their suite of information technology (IT) systems to support efficient and effective service delivery. The right IT infrastructure is critical for enabling efficient, effective, and secure Municipal operations. It was identified that within the Municipality many departments use different legacy customer service IT systems that do not currently integrate. The lack of integration impacts data collection, analysis, and information sharing. However, multiple IT improvement initiatives are underway or planned to address known IT related service challenges.

The relevant IT projects underway that will impact centralization include AMANDA, Inquiry Portal and SharePoint. Another notable technology used to support service delivery is the telephony system Mitel MiContact Centre Business. While there are current planned initiatives to modify this application, expanding its scope of service to include most robust metric collection and reporting functionality has not been implemented.

The recommended technology solution to support a centralized service model is to leverage AMANDA as the primary CRM/Workflow management solution. To ensure the full scope of services are included, customization of the AMANDA build should include key service-related processes (detailed below) In the interim while AMANDA is being built, the Inquiry Portal can be leveraged as a centralized case management system to manage service transactions. This will require a build to include services which has not yet been included (detailed below) within the Inquiry Portal. Once SharePoint is built, it will act as a shared knowledge management system. Both SharePoint and the Inquiry Portal can integrate into AMANDA. The service team will continue to use the Mitel MiContact Centre Business telephony system and leverage the metric and reporting functionality.

Details of each system including an overview of the capabilities, challenges with system design / implementation and opportunities are captured below.

## **AMANDA IT System**

### **Overview**

Clarington is undergoing a digital transformation with the design, build, and implementation of the AMANDA IT System. This will act as Clarington’s major IT infrastructure and workflow management software. AMANDA will also act as the Municipality’s CRM solution. The build and deployment of AMANDA would allow for an omni-channel approach to centralized information collection by gathering customer responses from multiple channels including, in person counter visits, phone calls, emails, and social media messages. This would provide customer service representatives with a central database of information about the customer and any interactions they have had with the Municipality. This would improve the efficiency and effectiveness of customer service delivery by tailoring each response to the situation. Additionally, a CRM system (as well as the Mitel MiContact Centre Business telephony system) would support automated reporting of data including, tracking the Municipalities performance against service standards.

Workflows included in the planned design of AMANDA are detailed below.

<b>Workflow 1</b>	<b>Workflow 2</b>	<b>Workflow 3</b>
Access Permit	Freedom of Information (FOI)	Fire Safety Plan Review
Addressing	General Complaint	Fireworks Permit
Adult Entertainment	Grant	Pre-Consultation
Agency Approval	Heritage Permit	Public Works Complaint
Apartment-in-House	Kennel	Refreshment Vehicle
Auctioneer	Land Division	Regional Plan
Body Rub Parlour	Letters of Credit	Amendment
Building Complaint	Letters of Credit Purpose	Road Occupancy Permit
Building Permit	Lottery	Sign By-Law Amendment
Capital Works	Minor Variance	Sign Minor Variance
		Sign Permit

Workflow 1	Workflow 2	Workflow 3
Official Plan Amendment	Mobile Sign	Site Alteration Permit
Condominium	Municipal Consent	Site Plan
Election Sign	By-Law Enforcement Complaint	Special Events Permit
Emergency Services Complaint	On-Street Parking	Street Naming
Fire Inspection	Order	Subdivision
Fire Investigation	Park Lot Control	Vehicle for Hire
Fire Permit	Peddler	Zoning Amendment
Fire Public Education Event	Pool Enclosure	

### **Challenge**

AMANDA is currently being developed based on the defined scope above. Implementation is planned for July 2022. To support a centralized service model in the near future, an interim solution will be required (Inquiry Portal) to support the gap in technology.

In addition to deployment timing, the tool was originally being designed as a case management solution, however, has the capability to expand features and functionality to align to service delivery requirements (as stated above). The expansion of scope to align with the recommended centralization framework is critical to the future success of this tool and will require added costs which have been outlined in Appendix IV.

Defining the appropriate structure of workflows is a critical building block to service centralization. As a Guiding Principle, it is recommended that the structure for “General” customer-contact related workflows be as streamlined as possible.

### **Example of this Guiding Principle**

Creating a single workflow for each of the identified customer service “Jobs” is the most effective way to streamline service delivery for the centralized team. For example, handling customer complaints should be broken into workflows for:

- General Complaint, Building Complaint, Public Works Complaint, Emergency Service Complaint, Bylaw Enforcement Complaint

By leveraging this naming terminology / convention it restricts this type of customer service to just one category (e.g., “Complaints”). Other areas service such as “Inquiries” would require the same set of workflows / folders to be created. This requires additional effort and cost.

It is understood that there are information privacy concerns for some services. These may require a separate workflow / folder in order to restrict access. By segregating these restricted workflows, it will still allow the centralized service team to access to the functionality and information required to complete the service transitions within their authorized discretion.

### **Opportunity**

AMANDA is being designed to act as a centralized system to automate workflow processes, provide citizens access to government services through a Citizen Portal, and integrate issue / complaint and workflow management systems to deliver the functionality similar to CRM.

AMANDA will act as the major IT system supporting the centralized service model. To meet centralized service delivery requirements, additional services / workflows and functionality are required to be included within the build. A comprehensive list of these services can be found in Appendix III.

The customer portal aspect of the AMANDA design is also key for supporting centralized service. Specifically, it will support broader self-serve and access functionality. Leveraging the existing SOW for the AMANDA build, the key customer self-serve and access functionality and/or integrations that should be included are:

- Payments for all Services – *Self-Serve Functionality*
- Access to all Documents, Forms, Statements – *Access Functionality*
- Booking and Registration for all Requests – *Self-Serve Functionality*
  - *Note: ActiveNet will still be utilized to facilitate certain Booking and Registration functions that are not able to be done in AMANDA*
- Visible Progress / Status Updates Along Process - *Access Functionality*

Note: The functionality listed above is a good start to support centralized service delivery. However, as stated in the myDurham311 assessment, as service delivery becomes more sophisticated and additional features are required to transition to more digital customer-driven processes, AMANDA should be re-evaluated to ensure needs are still being met.

## **Planning Department Customer Inquiry Portal**

### ***Overview***

The Customer Inquiry Portal was created internally for the Planning & Development Department to track inquiries for properties. The app was developed by a member of the in-house IT team and is a dashboard that was built upon the existing GIS Software with key functionality including:

- Address search in a visual map
- Tracking and finding existing information about an inquiry and add/edit inquiries
- Manages inquiries by having front desk staff take in the request and then assigning it to a planner who receives an automated email of the details of the inquiry and then resolves it.
- Track data / statistics about inquiries for internal performance metrics (i.e., inquiry turnaround time, average inquiries per day, inquiry types & status, etc.)

The Inquiry Portal is a good interim solution as AMANDA is being built. It provides the functionality to currently satisfy one departments customer service delivery. However, this should not be considered a long-term solution.

### ***Challenge***

Currently, the Inquiry Portal's complaints / inquiries tracking functionality is being developed but does not exist for all services the Municipality provides. In addition to the reduced scope of the current application, implications such as degree of centralization and / or integration of information between departments raises privacy and access concerns that must be considered.

### ***Opportunity***

There is a potential opportunity to leverage the Inquiry Portal that was initially built for the Planning & Development Department across other departments.

The Inquiry Portal is a viable and cost-effective solution to consider **as an interim CRM tool** prior to the deployment of AMANDA. It is recommended that AMANDA be used as the longer-term IT solution to support centralized service delivery. Data from the Inquiry Portal can be integrated into AMANDA.

## **SharePoint Knowledge Management**

### ***Overview***

SharePoint is a web-based collaborative platform to store, organize, share, and access information from any device. It is currently being built as a knowledge management platform for the Municipality.

### ***Challenge***

Currently SharePoint is not organizationally deployed for use by all departments. It is in the build stage. Ad-hoc solutions for general knowledge share by department are being used inconsistently. This has created a knowledge gap amongst employees to complete service transactions within their departments and across the organizations.

### ***Opportunity***

All relevant service documentation required for CSR's to effectively service customers through the contact centre and front-desk should be stored in SharePoint. This tool will provide the software centralization solution required for knowledge-sharing. However, employees need to be properly trained on how to use the tool and leverage it to complete routine job tasks.

Once the AMANDA build is complete, SharePoint can integrate into AMANDA. This will allow for a single-use application for CSRs and Clerks to log customer service interactions and access the required information to process requests. This will increase efficiency for time to complete request and the quality of services provided.

## **Mitel MiContact Centre Business**

### ***Overview***

The Municipality currently leverages Mitel for the telephony system. The suite of products offered by Mitel MiContact Centre Business is vast, but currently underutilized. This is known by IT team members who are looking into updating our phone system's capabilities.

## **Challenge**

The Municipality's current use of the system is limited in functionality for phone only, however the system has the capability to include sophisticated IVR, analytics, scheduling / booking, automated credit card payments, chat, and email.

## **Opportunity**

Specifically, Mitel Business Analytics has two call analytics modules that are relevant to Service Clarington: Insight and Report. Insight provides powerful data visualization via an intuitive dashboard and essential wallboard. The Report module delivers enhanced level reporting, performance dashboards and customized wallboards. Key metrics that can be tracked using this feature of Mitel include:

- Total Calls
- Total Incoming Calls & Total Outgoing Calls
- Total Missed
- Unreturned Missed
- Busiest Hour
- Average Answer Time
- Longest Call

It is recommended that the Municipality leverage this extension of Mitel to support tracking of operational KPI's related to service delivery. The Municipality should also leverage Mitel as the email provider for the Service Clarington team. Centralized management of email integrated into the telephony system will help to streamline service delivery performed by the seven Clerks.

No additional IT resources will be required for the customization of IT solutions. All proposed solutions are relevant to the broader organization. The Service Clarington team will need to work in partnership with IT for the successful customization of the tool build, deployment, and training.

## Departmental Service Inventory & Process Journey

Service Inventories and Service Journey Maps are tools to understand the internal processes that impact the service, operations / experience in the organization. As part of the Centralized Service Review, the consulting team developed a service inventory for Clarington and Customer Journey Maps to help identify redundancies and improvement opportunities.

### Service Inventory

The Service Inventory compiles and tracks all customer-facing services. This tool is utilized to assess how services are currently being delivered to identify inefficiencies within service lines. The information collected about each service includes:

- **Overview / Process:** Department, Business Line, Service Touchpoint.
- **Channels:** Customer Interaction with Service, Customer Self-Serve Option.
- **People:** Service Team Roles, Key Service Responsibilities.
- **Technology:** IT System/Program, Integration Level.
- **Management Measures:** Performance Metrics (SLA / KPI), Utilization (Volume / Frequency);
- **Customer Experience:** Primary Jobs-To-Be-Done, Secondary Jobs-To-Be-Done

When assessing the Municipality of Clarington services, **44 customer service touchpoints** were found across the Municipality. Out of these touchpoints, two key opportunities were identified. These include:

- **Address an Issue / Inquiry** appeared 12 times across all departments: Centralization of this “Job” will minimize duplication and streamline the resolution of inquiries.
- **Make a Purchase / Payment** appeared across four departments: Centralization of this “Job” will reduce duplication of payment activity, payment inquiries, and payment processing.

### Service Journey Maps

The Service Journey Maps incorporate the internal employee process and the steps the customer has to go through to complete a transaction with Clarington. These maps provide visibility into the service process that involve both the customer and Municipal staff.

The journey mapping exercise included the following steps:

- **Step 1:** The consultant team identified the key service interactions (e.g., the critical “jobs” a customer is trying to complete when interacting with Clarington). Seven Journeys were mapped and include:
  - Resolution of Inquiry / Issue Direct to Mayors Office
  - Completion of a Tax Payment
  - Registration for a Municipal Program



- Approval of a Special Event Permit
- Resolution of a Snow Clearing Issue
- Resolution of a Property Standards Complaint
- Approval of an In-House Apartment Permit
- **Step 2:** Working with staff, we mapped the various interactions someone would have with the Municipality as they completed the job. This was viewed from the customer and employee perspective.
- **Step 3:** We identified pain-points in the journey and potential areas for improvement. Journeys were validated with Clarington staff.

Insights from these maps informed improvement opportunities aligned to business and customer needs. Improvements to increase efficiencies / savings from the existing pain-points and operational redundancies identified in the Journey Mapping exercise have been addressed in the Future-State Centralization Recommendations. “Future-State” opportunities look to address the root cause of the inefficiency and provide a long-term resolution.

The following section provides an overview of each Service Journey Map and outlines the key pain-points and process redundancies / inefficiencies.

### 1) Resolution of Inquiry / Issue Direct to Mayor and Councillors Office

This journey outlines the process in which inquiries to the Mayor and Councillors Office are resolved. The key stakeholders involved are the Office of the CAO with other departments dependent on the issue.

#### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **Inconsistent tracking of information:** The Municipality does not have an integrated system to track inquiries. As a result, tracking inquiries requires additional effort to triage the inquiry correctly and provide the customer with up-to-date information. Once an inquiry is triaged, the Mayor’s Office often needs to follow-up multiple times as the inquiry progress/analysis rests with different departments. This multi-departmental handling of issues and lack of a centralized system to track them make it challenging for staff to provide customers with correct information in a timely manner. This results in additional customer follow-up calls and emails.
- **Multiple channels to voice inquiry/complaint:** Currently there are multiple incoming channels for customers to submit inquiries / complaints (i.e., Mayor’s office, councillors, social media, multiple departments). While the channel optionality is positive to support a personalized customer experience, there is no internal process to track / integrate incoming complaints. Lack of centralization to manage inbound requests across all channels has resulted in delayed response times, missed responses and delivery of partial service / information. This has also resulted in duplicated effort to process service requests.

- **Varying levels of public awareness of the Municipality’s communication policy:** The general public lacks knowledge on Clarington’s communication policy, specifically guidelines around resolution timelines. This lack of understanding is likely a result of inaccessible public information. Residents find it difficult to locate information pertinent to their service needs. As a result, there are misinformed service level expectations. This drives more customer calls, complaints, and follow-ups, resulting in more internal effort and inefficiencies to complete service-related processes.

## 2) Completion of a Tax Payment

This journey outlines the process of preparing for and processing a tax payment. The key stakeholders involved includes staff in Financial Services, specifically taxation, and the Clerks role.

### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **No centralized knowledge base tool:** Currently there is no centralized tool to support knowledge sharing across the organization. Lack of access to specialized information makes it challenging for Clerks to appropriately resolve more complex tax inquiries. SharePoint is currently being developed and rolled-out across the organization to mitigate this but is not currently accessible and / or being used.
- **Unknown / unclear role boundaries:** Some tax inquiries are complex and contain private personal information. These transactions require specialized knowledge and system access to process.
- **Specialized knowledge required:** Many processes require specialized knowledge to complete tax transactions, limiting the scope of services front-line service employees can process.

## 3) Registration for a Municipal Program

This journey outlines the process of coordinating with and assisting customers to register for a Municipal program. The stakeholders reside within Community Services and include Program Managers, Facility CSRs, and Client Services Clerks.

### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **Staffing implications of part-time staff:** Documentation of processes and progress of projects is inconsistent, causing difficulty for part-time staff to stay up to date / informed. This knowledge gap makes it difficult for staff to successfully complete impacted service transactions.
- **Inconsistent / underutilization of tools and processes:** The use of manual / paper-based processes (i.e., tracking cancellations) and digital tools (i.e., ActiveNet notetaking not utilized or maintained correctly) are inconsistent. These inefficient practices for documentation, reporting and schedule management make it challenging for staff to complete transactions and deliver error-free service experiences.

- **Duplicated work efforts:** The implications resulting from the combined use of paper for tracking, limited functionality of OneNote to track information and outdated maintenance of ActiveNet often results in duplicated work effort for employees.

#### 4) Approval of a Special Event Permit

This journey outlines the process of assisting a customer in the planning and implementation of a special event. The key stakeholders involved span the organization dependent on the specific event / permit.

##### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **Multiple departments involved without integrated processes:** Many departments are involved to support residents and community members with event planning. However, there is little internal communication or integration across the departments. Lack of clarity on who is involved, when, and what the outcomes of each service touchpoint are has resulted in delayed service interactions, service errors and inefficiencies in internal processes to deliver.
- **Knowledge sharing is limited:** Knowledge for the process currently resides with one person. This is a major risk and currently causes delays and gaps in service delivery when they are unavailable.
- **Unclear permit processing:** Permits must be applied for in specific order, but customers often enter the process at whatever place they feel is easiest. This is likely due to lack of clarity / communication on the end-to-end process requirements. These additional customer touchpoints cause more work, time, and effort for Clarington to complete service requests.
- **Customer escalations are common:** Customers will escalate complaints / requests when they do not like the answer provided. Frontline service workers often feel undermined when their answer is overridden when their initial response was deemed appropriate based on training. Escalation process also causes duplication of work.
- **Multiple permits required:** Required permits are issued by separate departments. Since multiple permits are required for special events, there is a redundancy in the information that has to be submitted by the customer and processed by Clarington.

#### 5) Resolution of a Snow Clearing Issue

This journey outlines the resolution of a snow clearing issue for both sidewalks and roads (Regional / Municipal). The stakeholders involved were Community Services, Public Works, and By-Law Enforcement.

##### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **Lack of departmental integration:** Public Works and Municipal Law Enforcement use different systems to track and manage inquiries due to privacy restrictions. As a result, staff within Public Works do not have access to

Municipal By-Law systems to service customer requests. By-Law also does not have access to CityWide, limiting their visibility to provide accurate communication updates to customers. This results in customers being transferred or contacting the Municipality multiple times to have questions answered and issues resolved.

- **External Communication channels inefficient:** Website and outbound communication to residents during snow events lack clarity. Residents are often unaware of Municipal service timelines and guidelines to have snow removed from surrounding roads. This lack of clarity results in a surge of customer inquires through phone and email requesting information that could / should be readily accessible.
- **Numerous process “non-value” process steps:** significant time and effort is required to handle customer issues / inquiries and often involve multiple departments being involved when they are not required.

## 6) Resolution of a Property Standards Complaint

This journey outlines the process of intaking and the resolution of a property standards complaint, including the process of reviewing and actioning by-law infractions. The roles involved are the Municipal Law Clerk II and Municipal Law Enforcement Officer.

### **Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)**

- **Inefficient access to timely information:** LDO is not available to officers when out in the field. This lack of on-demand access to information regarding complaint and customer contact data makes it challenging for officers to complete tasks or process immediate updates. This is being resolved with the deployment of AMANDA which will include a remote portal.
- **Lack of understanding to self-resolve issues:** Many phone complaints are simple issues that a customer could self-resolve if they had access to the correct information. However, since every complaint must be done in writing, phone complaints must be manually transcribed by the complainant and sent. This process takes time and effort away from resolving more complex issues.
- **Incomplete complaints form documentation:** Incoming complaints / forms are not detailed enough to move forward with processing the complaint. Residents are required to fill-in the complaint form then provide additional information once the request is being processed. This causes extra customer touchpoints and work to complete the process. This also results in an inconsistent amount, detail level and quality of notes captured about a complaint in LDO.

## 7) Approval of an In-House Apartment Permit

This journey outlines the process of a resident inquiring and applying for a permit for an in-house apartment renovation, including the building inspection process. The department involved is Planning & Development Services.

## Key Current-State Pain-Points & Redundancies / Inefficiencies (“Waste”)

- **Poor integration between department divisions:** General siloed nature of Planning / Building department structure, processes, systems, services, and activities place major barriers and challenges to collaboration. This lack of integration demands manual activities between employees, resulting in inefficient knowledge transfer and communication between departments.
- **Lack of transparency with permitting approvals:** There is a general lack of transparency and visibility into status / progress of permit approvals. This results in additional customer inquiries asking for status updates.
- **Misalignment of roles and responsibilities:** The use of general inboxes for departments can cause confusion on who “owns” the activity / permit. This lack of clarity around task / job ownership causes delays in processing requests and internal hand-offs.

The Customer Journey Maps show that the Municipality has made strides to improve the delivery of service, both internally and externally. However, there is still room for improvement.

Below is a list of key areas of customer service where many of the maps highlight that the customer experience and operational process could be improved to reduce inefficiencies and redundancies.

Area	Description
<b>Disjointed Technology</b>	Staff across departments do not have access to centralized systems for processing transactions and accessing knowledge. This causes gaps in communication, extended transaction processing and duplication of work. It is important that the Municipality centralize and integrate existing technology systems. This will be addressed with the build and deployment of AMANDA.
<b>Service Standards</b>	Service standards applicable to many departments are not defined and / or not widely known by customers. This lack of clarity results in additional customer inquiries / requests requiring staff to conduct additional work.
<b>Customer Communication</b>	Outbound communication to customers is often inconsistent or lacks clarity. This knowledge gap in essential information (e.g., complaint status, service status) results in more inbound requests, causing additional work effort for staff.
<b>Transparency</b>	Limited visibility into process status (from a customer and employee perspective) results in more inbound inquiries from customers to ask for status updates. Employees who cannot access certain systems due to privacy restrictions are forced to transfer customer calls to multiple departments. This results in more people required to process transactions, yielding longer resolution times and increased work effort.

Area	Description
<b>Multi-Channel Access</b>	Customers have the option to contact the Municipality through multiple channels, however there is no centralized system to manage inbound requests. This results in delayed responses, lost service requests and additional work effort to complete.

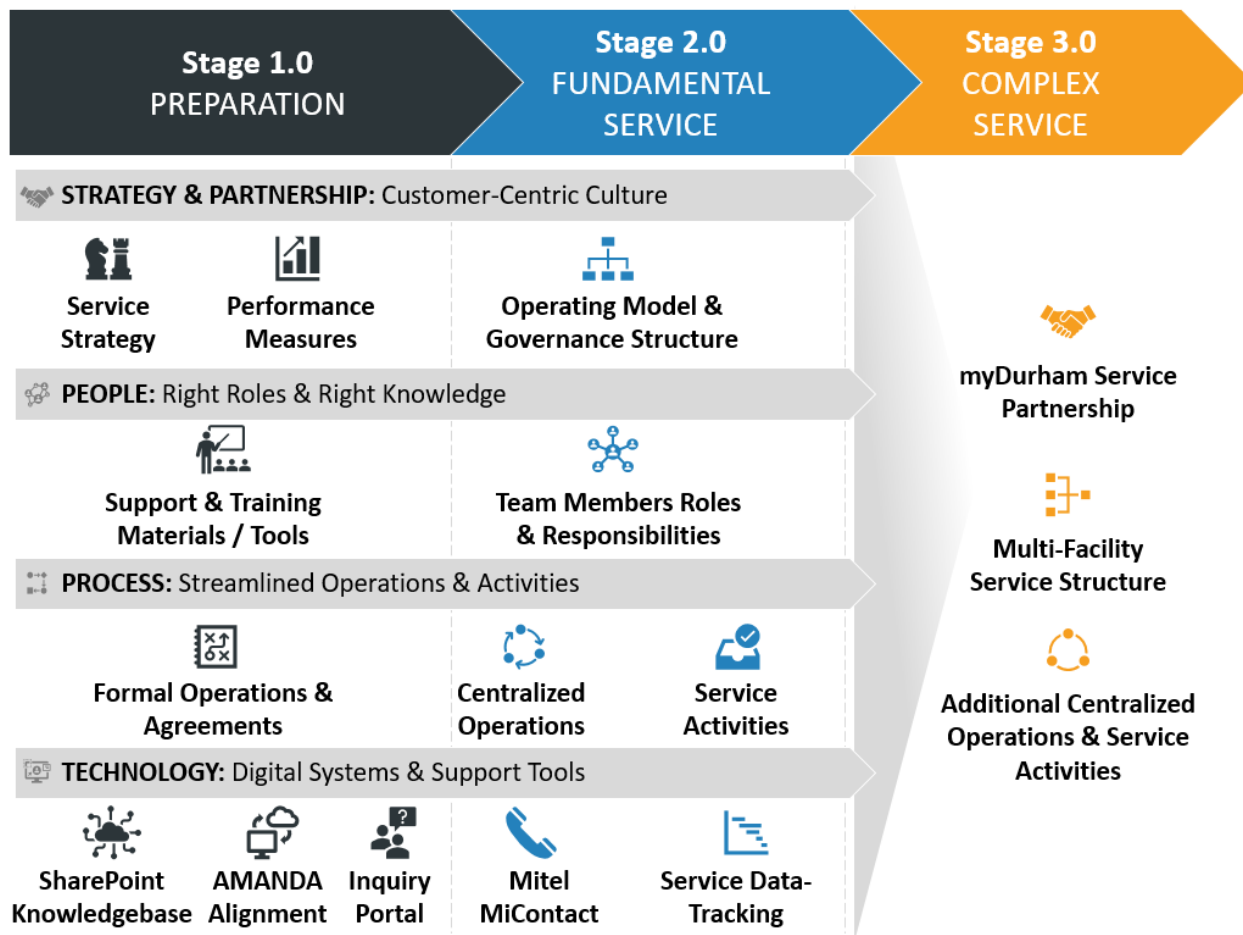
## Centralized Service Opportunities & Recommendations

### Clarington’s Centralization Framework

Centralizing Customer Service is a strategic, large-scale initiative that involves all departments listed in Appendix III within the Municipality. To best support Clarington through this long-term transformation, identified improvement opportunities and recommendations from the review are structured as a three-stage Centralization Framework.

This approach allows for the alignment of key information and outputs from the review including findings, recommendations, impacts / benefits, and implementation needs. The structure helps to outline the Municipality’s transformation “journey” in a clear and organized way while also providing a roadmap-style tool that can be used for current state implementation and future state planning. The following diagram summarizes the recommended three-stage Centralization Framework for Clarington.

### Clarington Centralization Framework



## Improvement Opportunities & Recommendations

To transform the existing customer service experience and processes into a centralized model requires the Municipality to implement a program of recommendations. Considering the strategic plan and analyses presented, we have developed a set of recommendations for how Clarington will implement a centralized customer service model.

Recommendations below are aligned to the three-stage Centralization Framework. Readers should note that the expenses and cost savings identified are by order of magnitude as many decisions that will affect them are still to be made.

## STAGE 1.0: PREPARATION

Recommendations within this stage are estimated to be completed and implemented within two years. The primary focus is on the setup of the organization and enabling employees with the capability, knowledge, and tools to deliver service successfully through a centralized model.

Opportunities have been categorized by Strategic Theme. A summary of each opportunity, the associated costs to implement and anticipated cost / efficiency savings is outlined in the table below. Details on cost / savings analysis can be found in Appendix IV.

	<b>RECOMMENDATION</b>	<b>COST TO IMPLEMENT</b>	<b>COST / EFFICIENCY SAVING</b>
S1	Create an Organizational “Service Excellence” Strategy	INT	N/A
S2	Define Organizational Service Level Standards & Metrics	\$0-\$10,000	N/A
S3	Implement Durham311 Telephone Exchange Agreement	N/A	\$0-10,000
R1	Develop Service Summaries for all Departments	INT	\$10,000-\$50K
R2	Create Support Materials, Guides, & Tools	INT	\$10,000-\$50K
P1	Create Process Maps for Service-Related Operations	\$10-\$50,000	N/A
P2	Develop Formal Service Agreements for Impacted Departments	INT	N/A
T1	Align AMANDA Planning & Design to Centralized Service	\$10,000-\$50K	N/A
T2	Build SharePoint Site for Centralized Service Team	\$0-\$10,000	\$10,000-\$50K
T3	Leverage “Planning” Customer Inquiry Portal as Interim CRM System	INT	\$50,000-\$100K
T4	Deploy Data Tracking & Management for Centralized Service	\$10,000-\$50K	N/A
<b>Estimated Stage Totals</b>		<b>\$30-\$170K</b>	<b>\$80-\$260K</b>

## **STRATEGIES & PARTNERSHIPS FOR SERVICE CENTRALIZATION**

### **Improvement Opportunities & Considerations**



- The foundation or framework for the customer service strategy is not defined. As a result, there is inconsistent understanding of what service “success” looks like at Clarington.
- The success of service initiatives will be dependent on the organizational culture / buy-in to support a centralized service model.

Clarington will need to determine what level of autonomy they wish to maintain over customer service interactions and processes in the long-term. The opportunity to partner with Durham in the long-term needs to be determined.

## **S1: Create an Organizational “Service Excellence” Strategy**

### **Overview**

- Define what “Great” customer service looks like at the organizational level and align all departments / employees with the consistent goals and expectations.
- Strategy Elements Include
  - Vision Statement to articulate the overarching purpose / goal for Clarington Customer Service.
  - Guiding Principles / Pillars to articulate tangible actions / behaviours supporting the Vision.
  - Customer Service Training program deployed to support Guiding Principles / Pillars.

### **Key Implementation Requirements**

- Engage the organization in the process of creating the strategy to generate more buy-in. The team leading the centralized service function should lead the engagement and work with all departments to get buy-in on service requirements and expectations.
- Facilitate a visioning workshop to uncover sentiments and develop Service Strategy.

### **Key Benefits & Value**

- Create a common language for service that supports employee decision making / autonomy.
- Decrease number of transfers and escalations from frontline employees requiring support.

### **Associated Costs & Savings**

- Cost to Implement: INT. Internal labor costs associated with strategy creation and workshops.
- Cost Savings: N/A. No savings associated with strategy design. Savings associated with the benefits after it has been implemented are captured within related recommendations.

Resource Needs: External Consultant / Vendor.

## **S2: Define Organizational Service Level Standards & Metrics**

### **Overview**

- Enhance data analysis and annual reporting through the creation of a measurement framework to track / manage service performance.
- Establish clear requirements for reporting (Service Standards, Metrics, Frequency). Develop a report outline for key performance indicators and metrics that could be shared as a common template across departments. Build into larger corporate KPI plan that CAO's Office is preparing.
- Leverage Mitel MiContact Centre Business features to collect phone-based handling metrics (expand current contract scope with Mitel to include features)
- In the long-term build a "Voice-of-the-Customer" Program which is the formalized way that an organization gathers customer feedback, analyzes, and actions what is uncovered to make service experience improvements. Deploying an organization wide VoC program will require an appropriate technology system to support metric capture.
- Service Level Standards (\*defined on pg. 26)
  - First-Touch Resolution Rate (FTR), Average Resolution Time (ART), Interactions Per Resolution (IPR), First-Response Time (FRT), Average Idle Time (AIT), Abandon Rate (ABR)
- Service Experience Metrics: (\*defined on pg. 26)
  - Customer Satisfaction Score (CSAT), Net Promoter Score (NPS), Customer Effort Score (CES), Customer Interaction Preferences (CIP)

### **Key Implementation Requirements**

- Align the Standards and Metrics to elements within the Service Excellence strategy.
- Expand use of Mitel to include Insights and Reports; negotiate contract.
- Pilot test to confirm data capture & tracking abilities in IT systems.

### **Key Benefits & Value**

- Quantify and track performance levels to identify and action service issues / improvements
- Standardize service quality levels across departments / employees
- Setup foundation for full Voice-of-the-Customer Program for further understand customer needs

### **Associated Costs & Savings**

- Cost to Implement: \$0 - \$10,000 (one-time), and \$0 - \$10,000 (annual). Costs are associated with additional services required from Mitel MiContact Business Center.
- Cost Savings: N/A. Metric tracking provides visibility into current performance which could support the identification of recommendations / opportunities for future savings. These savings would be project specific, and not captured in this general opportunity.

Resource Needs: Internal Resources.

### **S3: Implement Durham311 Telephone Exchange Agreement**

#### **Overview**

- Participate in requested activity from Durham Region for interim resolution to address overlapping 311 call routing. Calls from customers dialing 311 may get directed to the Durham centre or may get directed to the municipality in error.
- This may be a mutually beneficial system across all Durham-area municipalities, which will build a foundation for further partnering moving forward

#### **Key Implementation Requirements**

- Create centralized service phone number for incoming re-directed calls from the Region.
- Create Support Material / Guide for Clarington Employees to forward calls to the Region.

#### **Key Benefits & Value**

- Improve transfers for seamless customer inquiry handling.
- Decrease employee time / effort for transferring calls to Region.

#### **Associated Costs & Savings**

- Cost to Implement: N / A. Minimal internal effort to complete request.
- Cost Savings: \$0 - \$10,000. Savings result from reduced in-bound call requests for surrounding municipalities. The reduced call volumes reduce employee effort, yielding productivity savings.
- Resource Needs: Internal Resources (Work in Partnership with Durham).

### **RIGHT ROLES & RIGHT KNOWLEDGE FOR SERVICE CENTRALIZATION**

#### **Improvement Opportunities & Considerations**

- General lack of documentation / knowledgebase to house organizational & departmental service information pertaining to customer service requests / processes. Lack of access to information creates challenges for employees to resolve service requests outside of their area of expertise.
- Frontline employees do not always have up-to-date information about any changes in services.
- Information sharing can be restricted between departments or difficult to find.

### **R1: Develop Service Summaries for all Departments & Employees**

#### **Overview**

- Outline key service-related information in concise "Service Summaries", used by Service Team.

- The “Service Summary One-Page” includes information for the description of department, organizational chart, services offered, key activities performed, employee roles / responsibilities, contact information, & key subject matter expertise.

### **Key Implementation Requirements**

- Collaborate with employees from each department to gather information / create materials.
- Build Service Summary documents and share-out / review to relevant teams to ensure accuracy.
- Utilize SharePoint platform to store / manage Service One-Page Summaries.
- Train employees on how to access and apply summaries (aligned to Training Recommendation).

### **Key Benefits & Value**

- Increase role clarity and autonomy among Service Team
- Decrease employee time / effort from errors or inefficiencies caused by incorrect transfers

### **Associated Costs & Savings**

- Cost to Implement: INT. Cost includes the build time / effort from internal employees.
- Cost Savings: \$10,000 - \$50,000. Not direct cost savings identified with the build of the Service Summaries. Cost savings will result from the training and application of Service Summaries. This is accounted for in the training related recommendations.

Resource Needs: Internal Resources.

## **R2: Create Support Materials, Guides, & Tools**

### **Overview**

- To support the desired customer experience and service standards, as detailed in recommendation S2, it is recommended that the Municipality develop customer service training for all customer-facing staff to ensure service delivery is consistent.
- The table below details the steps required to develop customer service training.
- Create standardized support / training tailored for the centralized structure of services and activities. Training should be designed to educate service employees on the scope of customer interactions they are required to manage and what interactions can be escalated. The objective is to adequately train employees on job scope to reduce escalations and transfers.
- Key Support Material to Include
  - Organizational “Triage-Tree”: Visual diagram of the organizational structure that outlines key information from Service Summaries to support employees with knowing where, when, and how to transfer calls.

- Common FAQ's: List of customer frequently asked questions that employees can access.

Service Delivery Job Aids: Reference guides of key procedures / activities performed by employees to complete services.

### **The Customer Service Training architecture should follow this format:**

1. Desired Customer Experience: Define customer needs and expectations
2. Standards: Define desired customer service standards
3. Competencies and Behaviours: Define the desired competencies and behaviours required to achieve process and service standards
4. Process Maps: Define and illustrate the process and ensure alignment to service standards
5. Procedure / Work Instruction: Detail how staff should perform steps in the process and ensure alignment to experience and service standards
6. Tools and Templates: Develop the tools and templates required to support the process and the customer experience

### **Key Implementation Requirements**

- Collaborate with the HR Division to leverage existing training collateral on service delivery.
- Co-develop content for materials / guides with appropriate department subject experts.
- Utilize SharePoint to store / manage all the created materials

### **Key Benefits & Value**

- Decrease escalations / transfers by ensuring knowledge is available to action simple inquiries.
- Deliver consistent service aligned to defined service standards.

### **Associated Costs & Savings**

- Cost to Implement: INT. Costs to implement includes the build time / effort from internal employees.
- Cost Savings: \$10,000 - \$50,000. This is a cumulative savings which results from the on-going application of learning and access to knowledge.
- Resource Needs: Internal Resources

## **STREAMLINED PROCESS & ACTIVITIES FOR SERVICE CENTRALIZATION**

### **Improvement Opportunities & Considerations**

- Siloed organizational structure and departmental operations supporting delivery of services. This creates challenges for cross-functional coordination of employees to streamline service delivery.

- Multiple service intake channels/options provide customers with greater choice to submit service requests. However, the lack of centralization for inbound inquiries results in more customer touchpoints and work effort to complete transactions.
- General lack of certainty and consistency in delivering services due to undocumented processes.

## **P1: Create Process Maps for Service-Related Operations**

### **Overview**

- Outline the elements required for employees to deliver services, including internal workflow, activities, employees involved, and IT Systems used.
- Complete process maps for all current customer-facing services as well as internal service support functions that will become part of the centralized model. Provide clear context on what services are centralized and what services are executed by individual departments (when and how).
- Validate process maps and include as a Job-Aid for training.

### **Key Implementation Requirements**

- Leverage existing research to build baseline maps (AMANDA Maps / Service Journeys).
- Facilitate departmental & cross-functional group workshops to document detailed processes.

### **Key Benefits & Value**

- Identify / resolve inefficiencies within processes prior to executing centralization initiatives.
- Build vital knowledgebase as foundation of future-state process maps for centralized services.

### **Associated Costs & Savings**

- Cost to Implement: \$10,000 - \$50,000. Costs to build reflect external resource requirements. If available, skilled internal resources can be used, however this would require weeks of dedicated project-based work.
- Cost Savings: N/A. Not direct cost savings identified with the build of Process Maps. Costs savings will result from the training and application of Process Maps. This is accounted for in the training related recommendations.

Resource Needs: Support External Resources

## **P2: Develop Formal Service Agreements for Impacted Departments**

### **Overview**

- Define the service expectations and agreement of the service structure between impacted departments. These “Service Summaries” act as an agreement and reference guide for effective collaboration between the Service Team and individual departments.

- “Service Agreements” include information to define the service expectations, division of responsibilities / accountability, specific service standards, key policies / regulations, escalation / transfer procedures.
- Additional Agreements must be created for each partnership (i.e., myDurham, Vendors / Contractors, 3<sup>rd</sup> Party Regional Contact Center for Overflow / After Hours Service)

### **Sample Service Agreement Content**

A customer Service Agreement is an agreement between Service Clarington and an internal customer (e.g., department) or external customer (e.g., partner). Key pieces of information to include in the Service Agreement are:

- Scope of Services – Identification of the scope of services provided by Service Clarington. This should be aligned to the service processes mapped and reflect what customer questions, inquires and requests can be managed by Service Clarington prior to transferring the call. This can be designed as service-based scenario knowledge trees.
- Commitments - Specify the commitments that you agreed to fulfill for internal customers (departments or partners). A commitment is a level of service that is agreed upon and can be measured in a qualitative or quantitative way. This should be aligned to the service level standards / KPIs identified.
- Governance – Questions of “Why”, “Who does what?” and “When does it get done” need to be addressed. Clear hand-off points for service delivery for each department or partner needs to be established based on roles and responsibilities.
- Operations – Day-to-day activities related to Service Clarington’s delivery of services.
- Performance – Identification of outputs and outcomes internal and external customers expect to achieve from the agreements.

### **Key Implementation Requirements**

- Collaborate with employees in each department to gather information and create materials.
- Co-Develop Service Agreements and review with relevant teams to ensure accuracy.
- Utilize SharePoint platform to store / manage Service Agreements.

### **Key Benefits & Value**

- Eliminate ambiguity by defining responsibilities and accountability of each service partner.
- Tailored Agreements ensure formal “rules” are followed by each group involved and that the quality level of service is met.

### **Associated Costs & Savings**

- Cost to Implement: INT. Cost includes the build time / effort from internal employees.

- Cost Savings: N/A. No direct cost savings identified with the build of Service Agreements. Cost savings will result from the training and application of Service Agreements to properly execute roles. This is accounted for in the training related recommendations.
- Resource Needs: Internal Resource.

## **IT SYSTEMS & SUPPORT TOOLS FOR SERVICE CENTRALIZATION**

### **Improvement Opportunities & Considerations**

- Non-integrated / siloed IT infrastructure across departments causes significant challenges to delivering and centralizing services both within departments and cross-functionally. Access to system information and request processing is limited to system accessibility and functionality.
- A large-scale digital transformation initiative is underway with the build and deployment of AMANDA. This will address many identified service improvement opportunities, including workflow management, remote access to data, customer portal, CRM functionality, service management and integration and access to a knowledge base.

Alignment of design / build of the AMANDA System with the structure and implementation of centralized service model is vital to the success of both initiatives. AMANDA needs to be designed to meet the requirements from a quality of content, access of information, tracking of metrics share-out of information required to support a centralized service delivery model.

### **T1: Align AMANDA Planning & Design to Centralized Service**

#### **Overview**

- Create, validate, and socialize a master list of services that need to be included within the build of AMANDA to enable centralized service delivery The specific recommended centralized service functions to be included in AMANDA can be found in Appendix III.
- Align the Streamline “Folder” structure of the system so there are no / minimal duplicates (i.e., complaints management structured as single folder as opposed to individual departments).
- Integrate existing technology with AMANDA. Key integration areas or functions for AMANDA to have included in its design are:
  - Point-of-Sale System, LDO, CityWide, ActiveNet, Mitel MiContact Centre Business (Telephony SQL Data-Tracking), Inquiry Portal
- Define customer portal requirements (to be hosted on AMANDA) to support self-serve functionality. Recommended Customer Portal functions include:
- Make Payments, Complete / Submit Forms, Address Issue / Inquiry, View / Download Personal Information Statements, Apply / Approval for Permits, Licenses, Certificates.

#### **Key Implementation Requirements**



- Collaborate with IT vendor to discuss centralization recommendations and confirm actions.
- Modify / add key centralization functionality requirements into AMANDA System design.

### **Key Benefits & Value**

- Empower Customers with greater online / self-serve capabilities.
- Decrease incoming customer requests for “simple” service tasks
- Decrease incoming customer inquiries / follow-ups.
- Ability to achieve some of the estimated cost savings from efficiencies are dependent on system functionality.

### **Associated Costs & Savings**

- Cost to Implement: \$10,000 - \$50,000. Cost associated with the design to scope the build for the additional AMANDA features.
- Cost Savings: N/A. Cost savings associated with the use of AMANDA to deliver streamlined, centralized services reflected in individual opportunities.

Resource Needs: External Vendor Resource.

## **T2: Build SharePoint Site for Centralized Service Team**

### **Overview**

- Leverage current initiative for SharePoint to design & build a SharePoint site tailored to the centralized service model. Make the site accessible to Team Members as the primary knowledge management system.
- Outside of site-specific requirements, design of the overall SharePoint architecture must be readily accessible and simplified for the centralized service team to navigate. This means minimizing the number of windows / steps to access information.
- Upload all knowledge content to SharePoint including Training Materials, Job Aids, Process Maps, Service Summaries, Service Agreements.

### **Key Implementation Requirements**

- Collaborate with relevant departments to co-define architecture & content to be included.
- Provide Service Team with training on use of SharePoint site and upload content.

### **Key Benefits & Value**

- Increase knowledge / information accessing, sharing & updating.
- Dramatically decrease response time for inquiries & transfers to departments for “simple” tasks.

### **Associated Costs & Savings**

- Cost to Implement: \$0 - \$10,000. Costs to implement includes the build time / effort from internal employees.
- Cost Savings: \$10,000 - \$50,000. Cost savings associated with the on-going use of knowledge available within SharePoint.
- Resource Needs: Internal Resource.

### **T3: Leverage “Planning” Customer Inquiry Portal as Interim CRM System**

#### **Overview**

- Leverage the existing Customer Inquiry Portal (digital CRM-style tool) as an interim CRM-style tool until the AMANDA System is fully deployed and operational.
- Expand the current scope of tool to include all relevant services for centralized delivery. Use the current Customer template as a guide to design / build individual platforms for Office of the CAO, Community Services, Legislative Services, Financial Services, and Public Works departments.
- Ensure data-tracking for the Inquiry Portal is consistent across departments and aligned to AMANDA System functionality to ensure the future integration of data when deployed.

#### **Key Implementation Requirements**

- IT Team to collaborate with above departments to define individual Customer Inquiry Portal need.
- Build codified Inquiry Portal and provide training / guides to employee teams utilizing the tool.
- During the AMANDA build, ensure requirements for the integration of the Portal are met. Integrate Portal documentation during the appropriate build phase.

#### **Key Benefits & Value**

- Great ability to track / manage customer inquiries reducing duplicated effort and miscommunication

#### **Associated Costs & Savings**

- Cost to Implement: INT. Costs to implement includes the build time / effort from internal employees.
- Cost Savings: \$50,000 - \$100,000. Cost saving associated with the use and data integration.
- Resource Needs: Internal Resources.

### **T4: Deploy Data Tracking & Management for Centralized Service**

#### **Overview**

- Modify Mitel telephony system to include data-tracking / reporting function. Align with recommended standards, metrics, and service-related information.

- Collaborate with Mitel to confirm alignment / integration of data tracking between the AMANDA System and Mitel MiConnect Business Centre.
- Ensure integration of other internal systems collecting customer data with AMANDA. Key service data-tracking sources include:
  - ActiveNet, Mitel (SQL format), CityWide, Vailtech, Inquiry Portal (Current Internal Version & Future Designed Version), Social Media Management App
- Comprehensive data collection includes Customer Information, Business Information, and Operational Information, which should be available and accessible in a single data repository.
- Build of interim tracking dashboard for the Inquiry Portal

### **Key Implementation Requirements**

- Confirm / validate organizational and service standards / metrics to be used.
- Collaborate with IT Vendor to plan design of required systems integrated for data collection.

### **Key Benefits & Value**

- Increase transparency of information within centralized service team and across departments
- Improve overall data-collection for greater understanding and analysis capabilities for identifying improvement opportunities.
- Decrease employee time / effort in gathering & analyzing information.

### **Associated Costs & Savings**

- Cost to Implement: \$10,000 - \$50,000. Costs associated with the additional scope of Mitel MiConnect Business Centre required.
- Cost Savings: N/A. Costs savings associated with the on-going use of metrics / measurement included within individual opportunities.
- Resource Needs: External Vendor Resources.

## **STAGE 2.0: FUNDAMENTAL SERVICE**

Recommendations within this stage are estimated to be completed and implemented within two to five years. The primary focus is on the finalization of previous preparation activities, onboarding employees, and the rollout of the centralized service team.

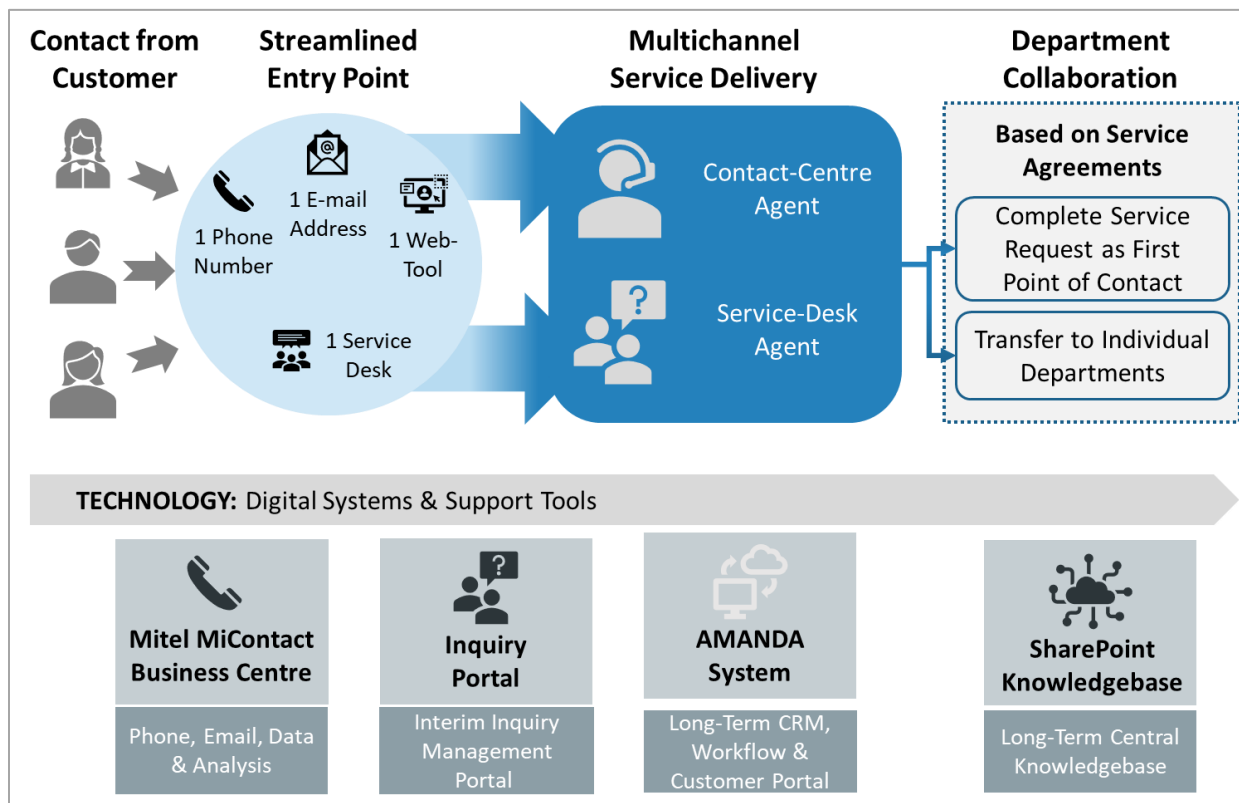
Below is a visual summary of what the centralized service delivery model will look like. Customers will have the opportunity to contact Service Clarington via phone, email, web-based tool, or Service Desk. All in-bound contact points will be streamlined by limiting access through one phone number, one email, single contact page on a web-tool and one physical service desk. Customer contacts will be logged, tracked, and centralized within the AMANDA system. As an interim solution while AMANDA is being

built, Clarington can leverage the Inquiry Portal (with the captured data being integrated into AMANDA). Inquiries are handled by dedicated Contact Centre Agents (manage phone, email, and web requests) and Service Desk Agents (manage in-person requests).

Both the Contact Centre Agents and Service Desk Agents will be the first point of contact for customers. It is expected these individuals will manage service interactions for all departments based on the defined Service Agreements. To enable employees with the right knowledge to complete these transactions, they will have access to general and specialized information housed on SharePoint (which will eventually be integrated into AMANDA). Any interactions that require highly specialized knowledge will be transferred to the appropriate department.

Note: SharePoint will act as a cloud-based platform to house all job / activity specific information. It will include all training content which is comprised of detailed job descriptions, job processes, Service Agreements and Service Standards.

### Summary Operating Model



Opportunities to support the build and delivery of this model have been categorized by Strategic Theme. A summary of each opportunity, the associated costs to implement and anticipated cost / efficiency savings is outlined in the table below. Details on cost / savings analysis can be found in Appendix IV.

RECOMMENDATION		COST TO IMPLEMENT	COST / EFFICIENCY SAVING
S4	Operating Model of Centralized Service Team	\$10,000-\$50K	N/A
S5	Governance Structure of Centralized Service Team	\$50,000-\$100K	N/A
R3	Service Team Roles & Responsibilities	INT	N/A
R4	Skills & Knowledge of Cross-Trained Service Team Members	\$10,000-\$50K	\$10,000-\$50K
P3	Fundamental Services Performed through Centralization	N/A	\$160K-\$285K
T5	Modified Service Entry / Communication Channels for Centralized Service	\$10,000-\$50K	\$50,000-\$100K
<b>Estimated Stage Totals</b>		<b>\$90,000-\$300,000</b>	<b>\$220,000-\$435,000</b>

## STRATEGY & PARTNERSHIPS FOR SERVICE CENTRALIZATION

### Improvement Opportunities & Considerations

- Combine similar services currently being performed by multiple departments / teams.
- Streamline and simplify delivery of services to decrease employee time / effort for transactions

Centralize in-bound service requests channels (e.g., e-mail, phone, web portal, in-person) to enable multi-channel service functionality with stronger internal control.

### S4: Operating Model of Centralized Service Team

#### Overview

- Centralized Service operations should be delivered through two channels, 1) Service Desk (physical location), and 2) Contact Centre.
- The Service Desk and Contact Centre act as the primary channel for “direct” access to the Municipality and the only channel promoted publicly.
- The Service Desk is responsible for processing in-person service transactions and the Contact Centre is responsible for managing service requests coming in via phone, e-mail, and web portal.
- It is recommended that general email boxes and phone extensions that are widely accessible by the public should be removed from the departments / services that

have been identified to be centralized in Stage 2.0. Note, this does not include individual Recreation Facilities.

- Existing departments may choose to support direct customer contact; however, these in-bound contact points should not be promoted to the public (specifics will need to be outlined within the Service Agreements with individual departments).
- Hours of Operation are defined as
  - Business Hours: Monday – Friday (8:30am – 4:30pm)
  - After Hours: Days and Times outside of Business Hours

### Operating Model Details

#### **Centralized Service Desk**

- Overview: General walk-in customer support for identified Stage 2.0 centralized services.
- Location: Municipal Administrative Centre (existing desk in lobby; modifications required).
- Operating Hours: Monday – Friday (8:30am – 4:30pm).
- Service Channels:
  - Service Desk – physical location for in-person service to customers.
  - Phone - one external number available to customers.
  - E-mail - one external address / inbox available to customers.
- Resources: 2 Full-Time, Cross-Trained Clerks available during operating hours

#### **Centralized Contact Centre**

- Overview: General in-bound service support for all departments and business units across The Municipality of Clarington.
- Location: Garnet B. Rickard Recreation Complex.
- Operating Hours:
  - Monday – Friday (7:00am – 8:00pm).
  - Saturday – Sunday (8:00am – 4:00pm).
- Channels:
  - Phone - one external number available to customers.
  - E-mail - one external address / inbox available to customers.
  - Web-Tool – online submission-form available to customers (powered by AMANDA).
- Resources: 3 Cross-Trained Clerks Available During Business Hours and 2 Part-Time, Cross-Trained Clerks Available During After Business Hours.

#### **Key Implementation Requirements**

- Setup a single centralized email address and phone extension for the Service Clarington team.
- Close-out general mailboxes and phone extensions for departments identified for centralization in Stage 2.0 (close-out decision based on Service Agreements).

#### **Key Benefits & Value**

- Decrease employee time/effort for actioning or transferring customer needs that are not part of their department services.
- Improve employee efficiency/productivity from decreased disruption by in-person customer needs.
- Minimize amount of customer contact for “simple” requests directed to department employees.
- Extend operating hours to improve accessibility and reduce peaks in contact volumes.

### **Associated Costs & Savings**

- Cost to Implement: \$10,000 - \$50,000. Costs to implement includes the build time / effort from internal employees.
- Cost Savings: N/A. Cost savings associated with the implementation of the operating model captured in individual opportunities.
- Resource Needs: Internal – Added PT Employees.

## **S4: Governance Structure of Centralized Service Team**

### **Overview**

- The new “Service Clarington” team responsible for the management & delivery of centralized customer service should be incorporated in the Community Services department.
- The organizational chart for Service Team aligns to the existing structure and hierarchy which currently exists within the Community Services department. These roles include:
  - Director, Manager, Coordinator, Clerk I / Clerk II
- The leadership hierarchy / roles of Director, Manager, and Coordinator are recommended to remain the same. The Service Team should be incorporated into existing department structure.
- Recommended Frontline Service Team Members
  - 1 F/T (Existing Office of the CAO)
  - 1 F/T (Existing Community Services)
  - 1 F/T (Existing Legislative Services)
  - 1 F/T (Existing Financial Services - Tax)
  - 1 F/T (Existing Public Works)
  - 2 P/T (New-Hire No Specialization)
  - 1 F/T (Existing Planning & Development) – Back Up
  - 1 P/T (Existing Community Services) – Back Up

- The only requirement for specific Clerks to be positioned in either the Service Desk or Contact Centre roles is based on “after-hour” scheduling.
- It is recommended all Centralized Service Team Employees be cross trained to allow for flexibility in skills and coverage.

### **Key Implementation Requirements**

- Extended hours and coverage can be managed through modifying existing employees’ schedules and / or hiring additional part-time employees.
- As referenced in the Internal Landscape findings, considerations to collective bargaining agreements and employee morale must be considered when deciding the most appropriate approach to providing after-hour contact centre coverage.

### **Key Benefits & Value**

- Decrease number of customer contacts to various departments
- Increase frontline service skillset & knowledge across roles
- Increase transparency across roles and reduce effort when collaborating with employees
- Improve employee experience and professional development with more streamlined reporting with direct managers.

### **Associated Costs & Savings**

- Cost to Implement: \$50,000 - \$100,000 for additional P/T Internal Resources to be hired.
- Costing Savings: N/A. Cost savings associated with the implementation of the governance model captured in individual opportunities.
- Resource Needs: Additional P/T Internal Resources to be hired.

## **RIGHT ROLES & RIGHT KNOWLEDGE FOR SERVICE CENTRALIZATION**

### **Improvement Opportunities & Considerations**

- Combine similar services and activities currently being performed by multiple departments.
- Group key activities for select employee groups to identify synergies and redundancies across roles. Transfer identified activities to Service Clarington to streamline delivery of services. This will free-up time and capacity of employees across departments.
- Centralization of roles will support more effective direct reporting, management, and cohesion of team members.

### **R3: Service Team Roles & Responsibilities**

#### **Overview**



- The roles and responsibilities of the centralized service team should align to the existing definitions within the Community Services department.
- Employee knowledge will need to expand to include the identified services being centralized in Stage 2.0, however the activities performed are similar to those currently being performed.
- Within Stage 2.0 it is recommended that the frontline Service Team act as “generalists” with the ability to provide more basic information and services. Requests requiring specialized knowledge should be transferred to the respective department.
- The table below summarizes the key roles and responsibilities of the Service Team.

### **Centralized Service Team Roles & Responsibilities Details**

#### **Manager**

- **Define service success:** In collaboration with the Director of Community Services, responsible for defining the future of the Municipality’s services.
- **Coordinate service delivery:** coordinate a standardized customer service approach across all departments
- **Train and upskill employees:** provide customer service training
- **Performance management:** report out on KPI indicators

#### **Coordinator**

- **Determine resource requirements:** identify and plan for resource requirements to meet specified service coverage for all channels. Create effective and timely staffing schedules for multi-shift, multi-site contact and front-desk centres
- **Lead service team:** manage day-to-day centralized customer service accountabilities of the team
- **Managing scheduling conflicts:** manage real-time changes to schedules to ensure coverage and SLAs are being met

#### **High-level Competency & Service Complexity (F/T), Medium-level Competency & Service Complexity (P/T), & Back-Up**

- **Take ownership of customer issues:** take ownership of the customer’s service request and be the single point of contact for all enquiries related to the service inquires, transactions, complaints, and requests. Provide information on the expected resolution time, and updates on the progress made.
- **Escalate unresolved service requests to the appropriate internal departments:** for service requests beyond the scope identified in the Service Agreements, ensure the request is being communicated to the right internal departments and that they take the appropriate action to resolve it.
- **Collect prompt and accurate feedback from customers:** where appropriate post-transactions / experience, follow-up with customers, find out if the solution was beneficial and take note of customer’s suggestions on what can potentially improve their experience.

- **Document shared knowledge:** for unique service requests / situations, document the successfully executed solution within SharePoint. Continuously add learning content to the shared knowledgebase to support on-going learning.
- **Master the use of service software:** all of the above tasks should be done leveraging appropriate technology (AMANDA, Inquiry Portal, Mitel MiContact)

### **Key Implementation Requirements**

- As referenced in Internal Landscape findings, it is important to involve Pay Equity Partners in the planning and redesign of any full-time job descriptions to ensure regulatory compliance.
- Specific knowledge / skills required for the frontline Service Team needs to be aligned to all department expectations and documented in the Service Agreements. Department expectations may vary on the types of inquiries and level of detail expected from the Service Team to deliver.

### **Key Benefits & Value**

- Improve employee and customer understanding of the Municipal service roles & responsibilities.
- Increase employee productivity and skill development with direct day-to-day management / contact.
- Increase hours of operation for delivery & accessibility of key services to customers.

### **Associated Costs & Savings**

- Cost to Implement: INT. Internal labor associated with training & development.
- Cost Savings: N/A. Savings captured with role clarity captured in individual opportunities.
- Resource Needs: Internal Resources.

## **R4: Skills & Knowledge of Cross-Trained Service Team Members**

### **Overview**

- A centralized service team requires key skills & knowledge to effectively perform their duties.
- Every frontline Service Team member should have similar skills and knowledge with the ability to complete all identified services to be centralized in Stage 2.0.
- It is recommended to develop service specific training and deliver to the full team. Suggested training curriculum includes:
  - Soft skills and knowledge focused on building rapport, handling difficult situations, active listening / communication, and how to show empathy.
  - Tactical skills and knowledge of all centralized services delivered, employees / processes within departments, and service systems / tools required.

## Key Implementation Requirements

- Identify Team Member skills, competencies, and knowledge gaps to design tailored training. Opportunity to leverage this activity to train other employees across departments.
- Develop Service training curriculum and facilitate training sessions for Team Members. Leverage external consultants with expertise in Municipal service training design and delivery.

## Key Benefits & Value

- Improve overall organizational customer service soft skills, competencies & knowledge.
- Mitigate risk of decrease in service performance and / or loss of institutional knowledge from employee-to-employee.

## Associated Costs & Savings

- Cost to Implement: \$10,000 - \$50,000. Costs reflect external vendor to build and deliver training.
- Costing Savings: \$10,000 - \$50,000. savings associated with productivity gains from upskilled staff.

Resource Needs: External Vendor Resources to support creating and delivering training.

## STREAMLINED PROCESS & ACTIVITIES FOR SERVICE CENTRALIZATION

### Improvement Opportunities & Considerations

- Combine similar services and activities currently being performed by multiple departments.
- Decrease work redundancy and improve synergies of service tasks performed by grouping key activities within a single process

### P3: Fundamental Services Performed through Centralization

#### Overview

- The focus of Stage 2.0 is the centralization of more “basic” customer services across departments (Planning & Development not included within this stage).

A comprehensive list of all recommended services to be centralized within this Stage is found in the table below. The level of detail outlined is at the Customer Touchpoint level aligned to the Service Inventory. Non-customer service-related departments / activities are not included.

#### Stage 2.0 Services to be Centralized

#### Key content found in the table includes:

- Department and Business Line

- Customer / Service Touchpoint
- **Centralized Service:** Service delivery model based on a single point of entry for all service requests (centralized service). In all scenarios, The Service Team acts as the first point of contact with the customer, however the level of responsibility to process the request varies by service. A detailed list of service and service processing responsibilities is summarized below.
  - **Full:** Centralized Service Team owns all customer interactions related to the service request.
  - **Partial:** Centralized Service Team shares ownership of responsibilities to process customer service request with departments.
  - **None:** Centralized Service Team does not perform any activities related to the processing of the service request.
- **IT System Integration:** Planned and recommended level of AMANDA integration for services
  - **In-Scope:** Service / activity included in current project plan to be incorporated in System
  - **Recommend:** Current out-of-scope service / activity recommended to be added into project plan for incorporation into System

DEPARTMENT	CENTRALIZE SERVICE	PHASE	IT SYSTEM INTEGRATION
<b>OFFICE OF THE CAO</b>			
<b>Administration</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
<b>COMMUNITY SERVICES</b>			
<b>Client Services</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
Triage Incoming Inquires to Other Departments / Business Lines	Full	2.0	N / A
Manage Bookings and Registration for Programs / Services / Rentals	Partial	2.0	Recommend

DEPARTMENT	CENTRALIZE SERVICE	PHASE	IT SYSTEM INTEGRATION
<ul style="list-style-type: none"> <li><i>Recreation Classes, Fitness Memberships, Facility Rentals, Field / Ice Bookings</i></li> </ul>			
Process Payments for Bookings & Registrations <ul style="list-style-type: none"> <li><i>Recreation Classes, Fitness Memberships, Facility Rentals, Field / Ice</i></li> </ul>	Partial	2.0	Recommend
<ul style="list-style-type: none"> <li><i>Film Permitting</i></li> </ul>	None	N / A	N / A
<b>LEGISLATIVE SERVICES</b>			
<b>Council Services (Clerk's)</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
Process and Manage Approval of Departmental Permits / Licenses <ul style="list-style-type: none"> <li><i>Marriage License, Burial Permit / Death Registration, Pension / Life Certification, Lottery Licensing, Business Licensing</i></li> </ul>	Partial	2.0	In-Scope Out-of-Scope
Process and Manage Payments for Various Departmental Services	Partial	2.0	
<ul style="list-style-type: none"> <li><i>Licenses, Parking Tickets, Parking Permits</i></li> </ul>	Full	2.0	In-Scope Recommend
<ul style="list-style-type: none"> <li><i>FOI/MFIPPA Request, Cemeteries (5)</i></li> </ul>	None	N / A	In-Scope Out-of-Scope
<b>Animal Services</b>			

<b>DEPARTMENT</b>	<b>CENTRALIZE SERVICE</b>	<b>PHASE</b>	<b>IT SYSTEM INTEGRATION</b>
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
<b>FINANCIAL SERVICES</b>			
<b>Taxation</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
Complete and Manage Customer Payments of Property Taxes	Partial	2.0	Recommend
<b>PUBLIC WORKS</b>			
<b>Development, Operations and Infrastructure</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend
<b>EMERGENCY FIRE SERVICES</b>			
<b>Fire Prevention</b>			
Provide Information and Support to General Inquiries / Issues from Public	Partial	2.0	Recommend

**Key Implementation Requirements**

- There is a potential for two years to pass from the development of this report to the implementation of these centralized services. It is recommended to validate that the services still align with any restrictions / requirements outlined in the Service Agreement.
- Onboarding each identified service for centralization requires the recommendations listed in Stage 1.0 and 2.0 to be completed. Further information can be found in the high-level workplan for onboarding services in “Implementation Planning” of this Report.

**Key Benefits & Value**

- Decrease duplicate and redundant work effort across departments.
- Increase employee uninterrupted time and productivity / efficiency.
- Minimize time / effort required from employees getting involved in irrelevant service requests.

### **Associated Costs & Savings**

- Cost to Implement: N/A. Cost to implement reflected in the design recommendation for AMANDA.
- Cost Savings: \$100,000+. Savings associated with the elimination of redundancies in service delivery.
- Resource Needs: Internal Resources.

## **IT SYSTEMS & SUPPORT TOOLS FOR SERVICE CENTRALIZATION**

### **Improvement Opportunities & Considerations**

- Integrate service delivery systems and tools for cross-functional collaboration.
- Structure service entry channels and processes to increase control over how customers connect with the Municipality, who they contact with, and how they progress through services.

Leverage existing tool functionality to get the most value out of current License fees

### **T5: Modified Service Entry / Communication Channels for Centralized Service**

#### **Overview**

- Streamline public access from customer email. Create centralized service email / inbox and close existing “general” mailboxes of departments identified in this stage to have centralized services.
  - Transition mailbox provider from Outlook to Mitel MiConnect to support multi-person access to centralized email repository.
- Streamline public access from customer phone calls. Create a single, centralized contact number and remove / restrict existing “general” departmental extensions of identified departments incorporated into centralization.
- Reorganize online / website inquiry submission platform only send automated submissions from public to centralized service team and not the general mailbox of each department.

#### **Key Implementation Requirements**

- Confirm / validate general extensions, email boxes, and online / social media is removed.
- Setup modified “single” entry channel into Service Clarington team and close others.

#### **Key Benefits & Value**

- Decrease amount of employee effort / time from answering direct customer calls and emails.
- Minimize amount of “simple” customer contacts to department subject matter experts.

### Associated Costs & Savings

- Cost to Implement: \$10,000 - \$50,000 (annually).
- Cost Savings: \$50,000 - \$100,000. Cost savings associated with streamlined service delivery (enabled by technology) captured in individual opportunities associated with service delivery.
- Resource Needs: External Vendor Resources.

## STAGE 3.0: COMPLEX SERVICES

Recommendations within this stage are estimated to be completed and implemented over the course of or after the five-year mark. Primary focus is on the continued scale of centralization to incorporate Multi-Facility Service Clarington offerings and greater technology automation / functionality.

Opportunities to support the scaling and delivery of the model have been categorized by Strategic Theme. A summary of each opportunity, the associated costs to implement and anticipated cost / efficiency savings is outlined in the table below. Details on cost / savings analysis can be found in Appendix IV.

	RECOMMENDATION	COST TO IMPLEMENT	COST / EFFICIENCY SAVING
S6	Perform Feasibility Assessment for myDurham Partnership Opportunities	TBD	TBD
P4	Complex Services Performed through Centralization	\$50,000-\$100K	\$100K-\$235K
T6	Additional Self-Service Capabilities in Customer Portal	\$50,000-\$100K	\$100,000+ TBD
	<b>Estimated Stage Totals</b>	<b>\$100,000-\$350,000</b>	<b>\$200,000-\$335,000</b>

## STRATEGY & PARTNERSHIP

### Improvement Opportunities & Considerations

- Confirm up-to-date cost / benefit of partnership with myDurham to make confident and informed decision.



- Leverage existing resources and centralized foundation from Stage 2.0 to increase the complexity of services included in centralized team.
- Leverage Customer Portal infrastructure from AMANDA system to add more functionality for services that customers are able to complete online

## **S6: Perform Feasibility Assessment for myDurham Partnership Opportunities**

### **Overview**

- The value of partnering with Durham for centralized service is dependent on the progress / status of Clarington’s centralization transformation at the August 2023-25 timeframe. This is when Durham plans to be opening the opportunity to Municipalities.
- It is recommended within this Stage (Stage 3.0) that the Municipality partner with Durham through a Model 2: Partial Service partnership opportunity. However, it is recommended that the opportunity be revisited closer to the availability date to confirm the most viable way to move forward. During this stage, key considerations to advance the partnership include:
  - Effectiveness of Clarington’s IT Systems and Tools
  - Operating costs of running a Centralized Service Team
  - Growing skills/knowledge required for Team Members to deliver additional services
  - Further need for increased hours of operation to public

### **Key Implementation Requirements**

- Assess the “current” state of Clarington’s centralized service landscape (current refers to the timeframe of this recommended Stage in 2023-25).
- Diagnose the specifics of partnership capabilities, cost / saving, implementation needs.

### **Key Benefits & Value**

- Eliminate major Capital Expenditure for Enterprise Customer Relationship Management System (CRM) & Omni channel Contact Centre IT infrastructure / systems
- Decrease future resourcing needs for off-hours service. This is not a reduction in any hired employees, it is in reference to the decreased need for additional new-hires.

### **Associated Costs & Savings**

- Cost to Implement: TBD. Resource requirement determined when partner model selected.
- Costing Savings: TBD. No cost savings associated with the analysis of opportunities. Once a partner model is selected, appropriate cost savings can be identified.

- Resource Needs: Internal or External Resources.

### **P5: Complex Services Performed Through Centralization**

- Stage 3.0 focus is the centralization of more “complex” customer services across departments.
- Additional Focus is on the expansion of services to individual recreation facilities. Adding a Multi-Facility model to the Municipal service landscape will have significant costs associated with it from increasing CSR or adding Clerk positions into facilities. Therefore, the incorporation of Multi-Facility service into the Centralization Framework is not recommended within the timeline of the defined three stages.
- Comprehensive list of all recommended services to be centralized at this stage found in the table below. The level of detail outlined is at the Customer Touchpoint level aligned with the Service Inventory created within this project. Noncustomer service-related departments or activities are not included within the list.

### **Key Implementation Requirements**

- There is a potential for five years to pass from the development of this report to the implementation of these centralized services. It is recommended to validate that the services still align with any restrictions / requirements outlined in the Service Agreement.
- Onboarding each identified service for centralization requires the recommendations listed in Stage 1.0 and 2.0 to be completed. Further information can be found in the high-level workplan for onboarding services on page 62.

### **Key Benefits & Value**

- Decrease duplicate and redundant work effort across departments.
- Increase employee uninterrupted time and productivity / efficiency.
- Minimize time / effort required from employees getting involved in irrelevant service requests.

### **Associated Costs & Savings**

- Cost to Implement: \$50,000 - \$100,000. Potential to require additional employees to service team
- Cost Savings: \$100,000+. Savings associated with elimination of inefficiencies in delivering service.
- Resource Needs: Internal or External Resources

### **Stage 3.0 Services to be Centralized**

#### **Key content found in the table includes:**

- Department and Business Line
- Customer / Service Touchpoint

- **Centralized Service:** Service delivery model based on a single point of entry for all service requests (centralized service). In all scenarios, The Service Team acts as the first point of contact with the customer, however the level of responsibility to process the request varies by service. A detailed list of service and service processing responsibilities is summarized below.
  - **Full:** Centralized Service Team owns all customer interactions related to the service request.
  - **Partial:** Centralized Service Team shares ownership of responsibilities to process customer service request with departments.
  - **None:** Centralized Service Team does not perform any activities related to the processing of the service request.
- **IT System Integration:** Planned and recommended level of AMANDA integration for services
  - **In-Scope:** Service / activity included in current project plan to be incorporated in System
  - **Recommend:** Current out-of-scope service / activity recommended to be added into project plan for incorporation into System

DEPARTMENT	CENTRALIZE SERVICE	PHASE	IT SYSTEM INTEGRATION
<b>OFFICE OF THE CAO</b>			
<b>Administration</b>			
Support & Coordinate Customer & Elected Officials in Resolving Complaints	Partial	3.0	Recommend
<b>Communications</b>			
Manage Social Media Communications & Replies to Inquiries / Issues	Partial	3.0	Recommend
<b>COMMUNITY SERVICES</b>			
<b>Recreational Services</b>			
Manage Resolution of Facility Complaints	Partial	3.0	In-Scope

DEPARTMENT	CENTRALIZE SERVICE	PHASE	IT SYSTEM INTEGRATION
<b>LEGISLATIVE SERVICES</b>			
<b>Municipal Law Enforcement</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend
<b>Animal Services</b>			
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope
Process and Manage Approval of Animal Licenses	Partial	3.0	Out-of-Scope
<b>FINANCIAL SERVICES</b>			
<b>Taxation</b>			
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope
<b>PUBLIC WORKS</b>			
<b>Development, Infrastructure and Operations</b>			
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope
<b>PLANING &amp; DEVELOPMENT SERVICES</b>			
<b>Development Review</b>			
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend
<b>Building Permit &amp; Inspection</b>			

DEPARTMENT	CENTRALIZE SERVICE	PHASE	IT SYSTEM INTEGRATION
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend
Process and Manage Approval of Construction Related Permits <ul style="list-style-type: none"> <li><i>Building (Deck, Fence Dhed), Pool Enclosure, Sign, Mobile Sign, Election Sign</i></li> </ul>	Partial	3.0	In-Scope Recommend
Perform Building, Structural, Plumbing, HVAC Inspections	Partial	3.0	Recommend

### T6: Additional Self-Service Capabilities in Customer Portal

#### Overview

- Leverage centralized foundation of AMANDA to provide additional e-solutions that customers can use to complete services online (via Customer Portal design in AMANDA).
- With current information from this review, it is recommended to target the following self-serve functionalities. Note: The recommendations should be revisited closer to the potential design date to confirm the most appropriate way to move forward.  
Target Self-Serve Functionalities:
  - Scheduling / booking, all payments / purchases, All approval / application activities, All documents / statements

#### Key Implementation Requirements

- There is a potential for five years to pass from the development of this report to the implementation of these self-serve digital services. It is recommended to validate the opportunities still align with any changes to the IT Systems since 2021.

#### Key Benefits & Value

- Eliminate many customer touchpoints from increased self-service capabilities.
- Decrease overall service processing time / effort on internal employees.

#### Associated Costs & Savings

- Cost to Implement: \$50,000-\$100,000 (one-time) and \$10,000-\$50,000 (annually). Costs reflect the additional spend required to expand AMANDA scope and annual technology fees.

- Costing Savings: \$100,000+. Cost savings associated with the reduction of staff effort to process customer requests since many can be completed direct by customers.
- Resource Needs: Internal Resources

## Implementation Planning

### Overview

A strong and clear project governance is necessary to ensure execution of the centralized service model has a successful outcome. The table below outlines the various project roles and responsible functions required to support the implementation of the recommendations.

Role	Members	Functions
Sponsor	CAO	Executive Sponsorship
Steering Committee	Senior Leadership Team – Across Organization Community Services Leaders - Director	Leadership Support Decision Making Deliverable Approval Performance Management
Implementation Team	Community Services Manager & Coordinator Service Clarrington Team Customer Service Committee	Project Management Risk Management Financial Management Project Communications Deliverables (as described in recommendations)
IT Build and Support	IT Vendors	Co-Define Build Requirements Manage IT Build Aligned to Service Requirements (including interm Inquiry Portal solution) Provide IT Guidance / Training (including analysis of AMANDA system)

In the development of the high-level workplan, the following assumptions were made:

- The recommended organizational designs are approved.
- Qualified candidates can be sourced to fill open positions.

- Implementation Team resources are available with the capacity to complete required activities for the deployment of recommendations.
- The Implementation Teams are established on schedule and the Senior Leadership Team is able to successfully develop an integrated project plan and manage the project effectively.

The recommendations presented in this Service Delivery Review are intended to create long-term change. It is recommended that the Municipality employ change management strategies to ensure change is implemented in a sustainable way. Key considerations and “leading practices” have been provided below to support the Municipality throughout the implementation of recommendations.

### **Components of a Change Management Plan**

Effective change management involves carrying out activities that deliver on each of the five change management principles:

- Communication – sharing information about the change and providing opportunities for stakeholders to discuss the information and ask questions. The purpose of communication is to:
  - Answer people’s questions.
  - Build understanding about what is changing.
  - Alleviate fears and anxieties.
  - Create energy and enthusiasm for the change.
  - Recognize stakeholders as partners in the change

### **Key Roles to Support Change Management**

**Stakeholder Engagement** – bringing together individuals to engage in collaborating on defining objectives for the change, assessing readiness for change, and sharing their experiences and learning with one another.

**Sponsorship/Change Leadership** – during times of change, leaders are accountable for “living the change”, which means leading by example and holding oneself and others accountable for supporting the change. Leaders play an essential role in creating the conditions to help stakeholders understand change and successfully adapt.

**Resistance Management** – fostering an environment in which there is mutual trust and respect, and in which people feel comfortable with openly sharing their concerns, asking questions, and learning new knowledge and skills.

**Knowledge Transfer and Training** – ensuring that when the change is implemented, everyone has the knowledge they need to do things differently. Projects need to support knowledge transfer by providing people with effective training as well as resources like up-to-date policy and procedural documentation.

The overall success of Clarington’s centralized service model can be affected by the following risks:

Risk	Mitigation
Employee resistance to change	Employ change management strategies to include employees in change activities and increase overall buy-in.
Shortfalls in resourcing	Plan resources in advance and gain approval from the Project Sponsor and Steering Committee.
Delays in critical milestones	The Implementation Teams will conduct regular check-ins with the Steering Committee to report on progress.
Pace of change	The Implementation Teams will conduct regular check-ins with the Steering Committee to report on progress.
Municipal pressures/priorities	Monitor municipal priorities and participate in discussions to influence direction of change.



## Centralization High-Level Workplan

The following visual Workplan summarizes the cadence of implementing all recommendations in the Centralization Framework. The timeframe is aligned to specific “Implementation Requirement” activities outlined in the recommendations.

ID	ACTIVITY	2021	2022	2023	2024	2025	2026
	<b>Stage 1.0: Preparation</b>						
S1	Create an Organizational “Service Excellence” Strategy	█	█				
S2	Define Organizational Service Level Standards & Metrics	█	█				
S3	Implement Durham311 Telephone Exchange Agreement	█					
R1	Develop Service Summaries for all Departments		█				
R2	Create Support Materials, Guides, & Tools		█				
P1	Create Process Maps for Service-Related Operations		█				
P2	Develop Formal Service Agreements for Impacted Departments			█			
T1	Align AMANDA Planning & Design to Centralized Service		█				
T2	Build SharePoint Site for Centralized Service Team		█				
T3	Leverage “Planning” Customer Inquiry Portal as Interim CRM System	█	█	█			
T4	Deploy Data Tracking & Management for Centralized Service	█					

ID	ACTIVITY	2021	2022	2023	2024	2025	2026
	<b>Stage 2.0: Fundamental Service</b>						
S3	Operating Model of Centralized Service Team						
S4	Governance Structure of Centralized Service Team						
R3	Service Team Roles & Responsibilities						
R4	Skills & Knowledge of Cross-Trained Service Team Members						
P3	*Fundamental Services Performed through Centralization						
T5	Modified Service Entry / Communication Channels for Centralized Service						
	<b>Stage 3.0: Complex Service</b>						
S6	Perform Feasibility Assessment for myDurham Partnership Opportunities						
P4	*Complex Services Performed through Centralization						
T6	Additional Self-Service Capabilities in Customer Portal						

\*Further Detail to the Onboarding Activities for P3 & P4 Recommended Services to be Centralized found below on page 65

## Centralized Service Onboarding Workplan

The following visual Workplan summarizes the cadence of key activities for onboarding individual services to the Centralized Model.

#	ACTIVITY	W1	W2	W3	W4	W5	W6	W7
	<b>Each Recommended Service to Be Centralized</b>							
1	Review & Finalize Departmental Service Agreement with Leadership Members	█	█					
2	Facilitate Training Sessions for Employees (2 – 3 90mins Sessions)		█	█				
4	Facilitate Internal Practice Workshops to Build Competency with Utilizing Tools				█			
5	Pilot-Test Centralized Service During a 1-2-Week Live-Deployment					█	█	
6	Debrief Pilot-Test Results, Lessons Learned and Refine Service Delivery asRequired						█	
7	Go-Live with Centralized Service							█

# Appendix

## Appendix I: Research Methodology

### Stage 2.0: Discovery & Consultation

#### 2.1 Existing Service-Strategy Documents & Data / Insights

- Performed comprehensive review and analysis of all relevant data / documents obtained

#### 2.3 Internal Stakeholder Interviews

- Facilitated (10), virtual 60-minute interviews with the Customer Service Committee, Community Services Department, Legislative Services Department, Financial Services Department, Public Works Department, Planning and Department Services, Emergency and Fire Services, Mayor / CAO Office, Communications Division, Information Technology Division.
- The discussions followed the following topics:
  - Service Structure: What services you provide, support, and / or engage?
  - Service Delivery: How you and your teams execute, support, and / or engage services?
  - Customer Experience: How the community perceives and interacts with the services?
  - Challenges and Opportunities: Areas of improvement when delivering, supporting, and / or engaging services?

#### Participant List

Department	Name	Role
<b>Customer Service Committee</b>	Justin MacLean	Advisor, Corporate Policy and Strategic Initiatives
	Basia Radomski	Communications Manager
	Lee-Ann Reck	Community Services Manager
	Kristin Bullied	Continuous Improvement Representative
	Michelle Chambers	Administrative Assistant to the Municipal Clerk
	Theresa Gamble	Administrative Assistant to the Director of Planning
	Cindy Hammer	Information/Communications Clerk

<b>Department</b>	<b>Name</b>	<b>Role</b>
	Candice Hodgson	Customer Services Coordinator
	Jessica James	Taxation Services Manager
	Erica Mittag	Community Development Coordinator
<b>Community Services</b>	George Acorn Candice Hodgson Ken Ferguson Steve Myers	Director Customer Services Coordinator Facility Services Manager Recreation Services Manager
<b>Legislative Services</b>	Rob Maciver June Gallagher Duncan Anderson	Director Municipal Clerk Municipal Law Enforcement Manager
<b>Financial Services</b>	Trevor Pinn Michelle Pick Jessica James	Director/Treasurer Accounting Services Manager/Deputy Treasurer Taxation Services Manager
<b>Public Works</b>	Steve Brake Sean Bagshaw Brett Novak	Director Manager of Infrastructure Manager of Operations
<b>Planning and Development Services</b>	Ryan Windle Faye Langmaid Carlos Salazar Brent Rice Theresa Gamble Cindy Strike	Director Manager of Special Projects Manager of Community Planning & Design Chief Building Official Office Coordinator Manager of Development Review
<b>Emergency and Fire Services</b>	Gord Weir Randy Cowan	Director/Fire Chief Deputy Chief
<b>Mayor/CAO</b>	Heather Keyzers Amanda Welsh	Office Coordinator to the Mayor Councillors' Office Assistant

Department	Name	Role
<b>Communications</b>	Andy Allison Justin MacLean Basia Radomski	CAO Advisor, Corporate Policy & Strategic Initiatives Communications Manager
<b>IT</b>	Rob VanDyk Brandi Carlton	IT Manager Business Development Supervisor

2.4 Jurisdictional Scan

- Performed secondary research to gather data and best practices from similar peer regions.

2.5 Elected Official Interviews

- Facilitated (6), virtual 60-minute interviews with Council Members
- The discussions followed the following topics:
  - Introduction: Role and experience with Clarington
  - Common challenges / issues from an internal and external customer service focus

2.6 Community Survey – Experience and Survey Feedback

- One (1) questionnaire publicly promoted to all residents in Clarington via social media, email, and outreach groups (151 responses)

Community Focus-Group – Experience and Service Feedback / Improvements

- Facilitated 4, virtual 2-3hr sessions with community groups to discuss the following questions:
  - Why do you interact with the municipality?
  - What is most important to you when interacting with the municipality?
  - How do you prefer to achieve your tasks / outcomes?
- Community Groups – 5 participants, Developer Groups – 6 participants, Business Groups – 4 participants, Accessibility & Diversity – 5 participants

Additional interviews

- 1 individual 60-minute interview with Service Caledon representative, myDurham representative, Vision 33 representative, Planning Inquiry Portal, HR interview

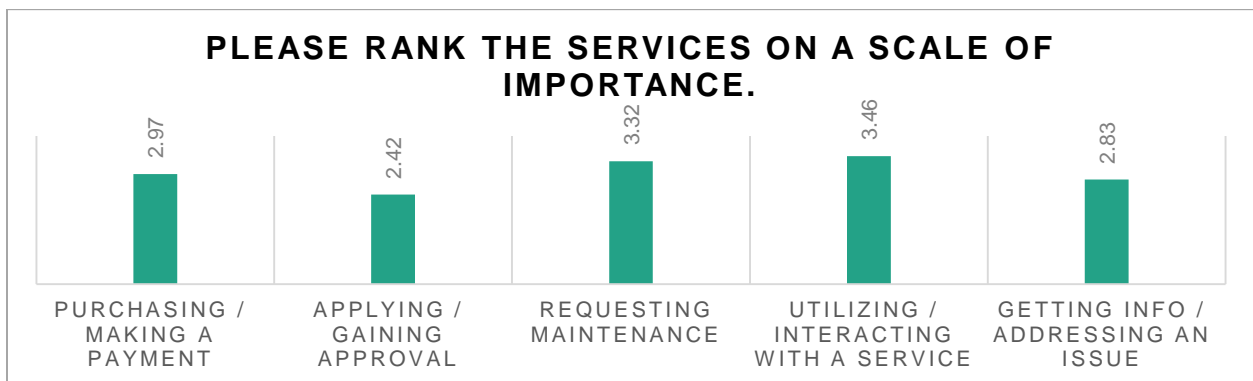
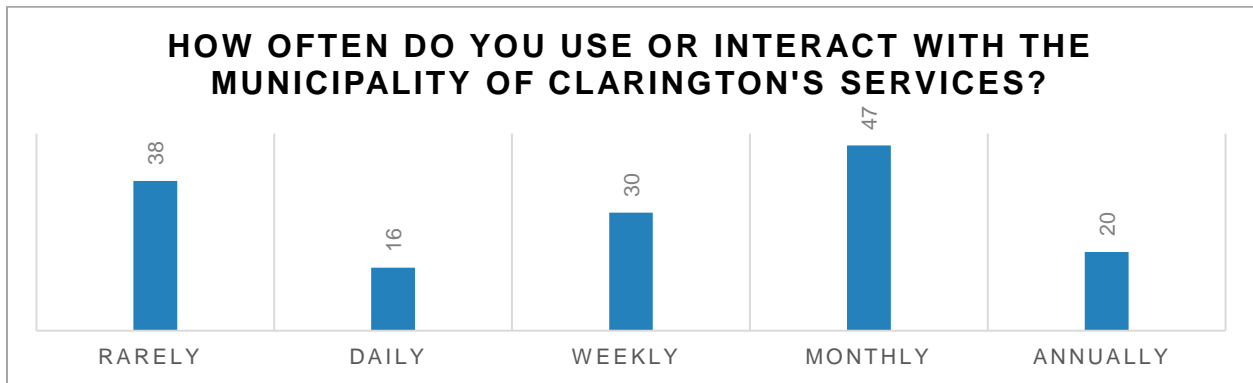
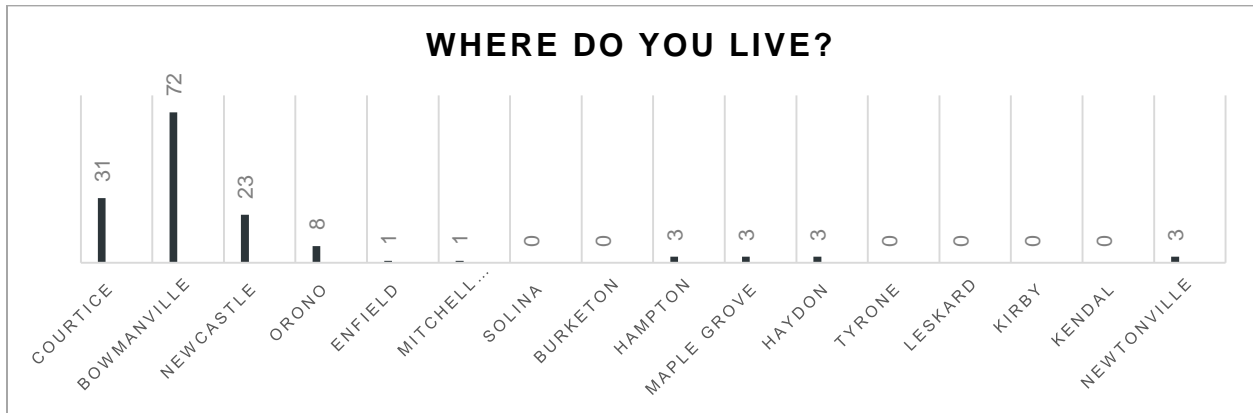
**Stage 3.0: Analysis**

3.2 Internal Customer Journey Mapping Workshop

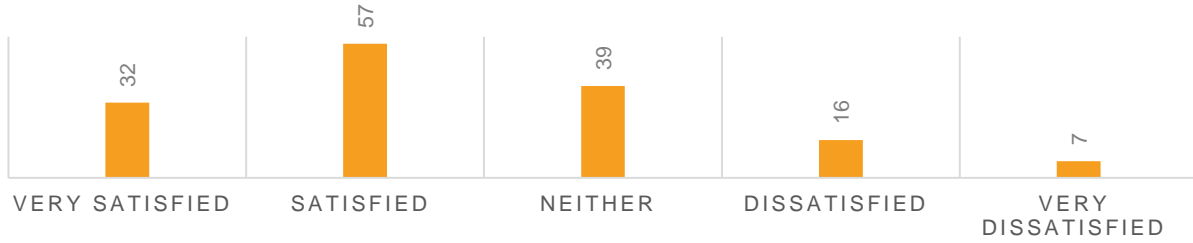
- Facilitated 8, virtual 2-3hr journey mapping workshops

## Appendix II: Community Survey Results

Below are the results of the community survey based on a total response rate of 151 participants.



**RATE YOUR LEVEL OF SATISFACTION BASED ON YOUR INTERACTION WITH THE MUNICIPAITY OF CLARINGTON.**



**RANK THE CHALLENGES / ISSUES YOU HAVE ENCOUNTERED WHEN USING CLARINTON SERVICES.**

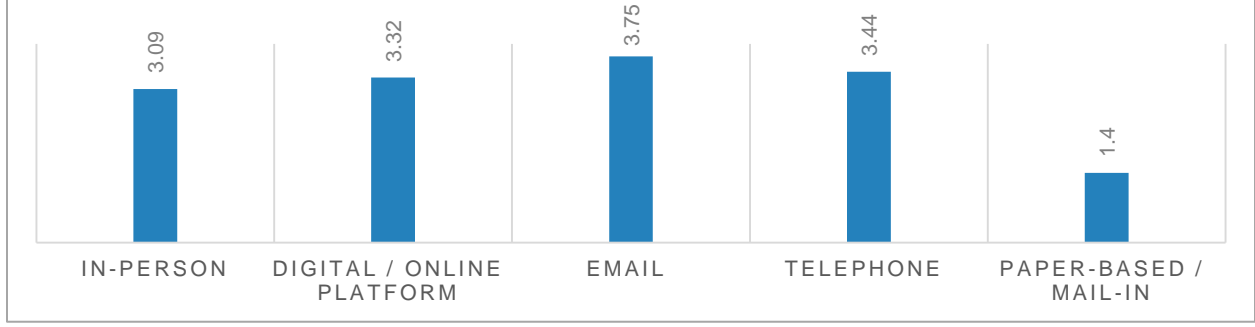


**RANK WHAT IS MOST IMPORTANT TO YOU WHEN YOU INTERACT WITH CLARINGTON SERVICES.**





### HOW DO YOU PREFER TO COMMUNICATE WITH THE MUNICIPALITY?



### **Appendix III: Comprehensive Centralized Services List**

A comprehensive list of all recommended services to be centralized at this Stage is found in the table below. The level of detail outlined is at the Customer Touchpoint level aligned with the Service Inventory created within this project. Noncustomer service-related departments or activities are not included within the list.

#### **Key content found in the table includes:**

- Department and Business Line
- Customer / Service Touchpoint
- Centralized Service: Recommended level of centralization to be implemented for services
  - Full: Centralized Service Team to own all customer interactions related to the service and look to remove the service being delivered from the individual department.
  - Partial: Centralized Service Team to share ownership responsibilities of customer interactions related to the service (to be defined in Service Agreements)
- IT System Integration: Planned and recommended level of AMANDA integration for services
  - In-Scope: Service / activity included in current project plan to be incorporated in System
  - Out-of-Scope: Service / activity not included in current project plan to be incorporated in System
  - Recommended: Current out-of-scope service / activity recommended to be added into project plan for incorporation into System
- Cost Saving: Financial impact of centralizing service

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
<b>OFFICE OF THE CAO</b>				
<b>Administration</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$5,000-\$10,000
Support & Coordinate Customer & Elected Officials in Resolving Complaints	Partial	3.0	In-Scope	\$10,000-\$20,000
<b>Communications</b>				
Design / Update Website functionality and Content	None	N / A	N / A	N / A
Manage Social Media Communications & Replies to Inquiries / Issues	Partial	3.0	Recommend	\$5,000-\$10,000
<b>COMMUNITY SERVICES</b>				
<b>Facilities Services</b>				
Maintain & Prepare Facilities for Formal Bookings Made by Customers	None	N / A	N / A	N / A
<b>Recreational Services</b>				
Manage Resolution of Facility Complaints	Partial	3.0	In-Scope	\$15,000-\$25,000

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
Deliver Formal Programs / Activities within Recreation Facilities <ul style="list-style-type: none"> <li><i>Aquafit, Fitness Centre, Group Fitness Programs, Skating Programs, Specialty Programs, Swimming Programs, Camps, Leadership, Sports &amp; Active Play</i></li> </ul>	None	N / A	N / A	N / A
<b>Client Services</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$10,000-\$20,000
Triage Incoming Inquires to Other Departments / Business Lines	Full	2.0	N / A	\$10,000-\$20,000
Manage Bookings and Registration for Programs / Services / Rentals <ul style="list-style-type: none"> <li><i>Recreation Classes, Facility Rentals, Field / Ice Bookings</i></li> </ul>	Partial	2.0	Recommend	\$10,000-\$30,000
Process Payments for Bookings & Registrations <ul style="list-style-type: none"> <li><i>Recreation Classes, Fitness Memberships, Facility Rentals, Field / Ice</i></li> </ul>	Partial	2.0	Recommend	\$10,000-\$20,000
<ul style="list-style-type: none"> <li><i>Film Permitting</i></li> </ul>	None	N / A	N / A	N / A
Support Internal Teams with Coordination of Special / Corporate Events	None	N / A	N / A	N / A

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
Manage Application & Processing of Community Grants	None	N / A	N / A	N / A
<b>LEGISLATIVE SERVICES</b>				
<b>Council Services (Clerk's)</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$10,000-\$20,000
Process and Manage Approval of Departmental Permits / Licenses <ul style="list-style-type: none"> <li><i>Marriage License, Burial Permit / Death Registration, Pension / Life Certification, Lottery Licensing, Business Licensing</i></li> </ul>	Partial	2.0	In-Scope Recommend	\$5,000-\$10,000
Process and Manage Payments for Various Departmental Services	Partial	2.0		
<ul style="list-style-type: none"> <li><i>Licenses, Parking Tickets, Parking Permits</i></li> </ul>	Full	2.0	In-Scope Recommend	\$20,000-\$30,000
<ul style="list-style-type: none"> <li><i>FOI/MFIPPA Request, Cemeteries (5)</i></li> </ul>	None	N / A	In-Scope Recommend	N / A
Perform Civil Marriage Ceremonies	None	N / A	N / A	N / A
Provide Commissioner of Oaths Services	None	N / A	N / A	N / A

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
Support Cross-Departmental Inquiries and Provide Requested Info / Docs	None	N / A	N / A	N / A
<b>Municipal Law Enforcement</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend	\$10,000-\$20,000
Manage Resolution of Bylaw Related Complaints	None	N / A		N / A
Process and Manage Approval of Permits / Licenses <ul style="list-style-type: none"> <li><i>Refreshment Vehicles, Auctioneer's License, Peddler License, Sign Companies, Vehicle for Hire, Burning Permit, Fireworks Permit, Parking Permit, Sign Permit, Special Events Permit, Kennel License</i></li> </ul>	None	N / A	In-Scope	N / A
<b>Animal Services</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$5,000-\$10,000
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope	\$0-\$5,000
Process and Manage Approval of Animal Licenses	Partial	3.0	In-Scope	\$0-\$5,000
<b>FINANCIAL SERVICES</b>				

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
<b>Taxation</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$20,000-\$30,000
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope	\$10,000-\$30,000
Complete and Manage Customer Payments of Property Taxes	Partial	2.0	Recommend	\$20,000-\$30,000
<b>Information Technology</b>				
Lead / Coordinate the Design, Build, Implementation of AMANDA Initiative	None	N / A	N/A	N / A
<b>PUBLIC WORKS</b>				
<b>Operations</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	2.0	Recommend	\$10,000-\$20,000
Manage Resolution of Departmental Complaints	Partial	3.0	In-Scope	\$10,000-\$20,000
Manage Maintenance of Roads & Parks (Seasonal Grass Cutting)	None	N / A	N / A	N / A

<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
Manage Maintenance of Sidewalks (Seasonal Snow Removal)	None	N / A	N / A	N / A
<b>PLANNING &amp; DEVELOPMENT SERVICES</b>				
<b>Community Planning &amp; Design</b>				
Process and Manage Review of Commercial Development Applications	None	N / A	N / A	N / A
<b>Development Review</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend	\$10,000-\$25,000
Manage Review & Sign-Off for Zoning / Land-Use Aspect of Permit Approval	None	N / A	N / A	N / A
<b>Special Projects</b>				
Support Permit Approval Process and Provide Information to Employees	None	N / A	N / A	N / A
<b>Building Permit &amp; Inspection</b>				
Provide Information and Support to General Inquiries / Issues from Public	Full	3.0	Recommend	\$5,000-\$10,000



<b>Department</b>	<b>CENTRALIZE SERVICE</b>	<b>STAGE</b>	<b>IT SYSTEM &amp; INTEGRATION</b>	<b>COST SAVING</b>
Process and Manage Approval of Construction Related Permits <ul style="list-style-type: none"> <li>Deck, Fence, Pool Enclosure, Shed, Sign</li> </ul>	Partial	3.0	In-Scope	\$15,000-\$50,000
Perform Building, Structural, Plumbing, HVAC Inspections	None	N / A	In-Scope	N / A
<b>EMERGENCY &amp; FIRE SERVICES</b>				
<b>Fire Suppression</b>				
Provide Emergency Services in Response to Calls from Public	None	N / A	N / A	N / A
<b>Fire Prevention</b>				
Provide Information and Support to General Inquiries / Issues from Public	Partial	2.0	Recommend	\$10,000 - \$30,000
Facilitate Educational Programs and Events to Public	None	N / A	In-Scope	N / A
Perform and Manage Fire inspections for Permit Approval	None	N / A	In-Scope	N / A

## Appendix IV: Recommendations Cost & Savings Details

In order to determine the costs to implement and potential cost savings, the following ranges were used:

- \$0 - \$10,000
- \$10,000 – \$50,000
- \$50,000 - \$100,000
- \$100,000+

Below is a summary of cost to implement and cost savings for each recommendation.

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
<b>STAGE 1.0:</b>					
S1	Create an Organizational “Service Excellence” Strategy	INT	<ul style="list-style-type: none"> <li>•Cost figures based on industry averages for external consultant support who deliver similar services.</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No identified cost savings</li> </ul>
S2	Define Organizational Service Level Standards & Metrics	\$0 – \$10,000	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>	N/A	<ul style="list-style-type: none"> <li>•No identified cost savings</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
S3	Implement Durham311 Telephone Exchange Agreement	N/A	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>	\$0 – \$10,000	<ul style="list-style-type: none"> <li>•Savings estimated based on reduced time &amp; effort associated with handling transfers to Region. Reduced work effort allows employees to spend time on more critical, value-add activities for the Municipality.</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved.</li> </ul>
R1	Develop Service Summaries for all Departments	INT	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>	\$10,000 - \$50,000	<ul style="list-style-type: none"> <li>•Cost savings associated with this captured in R2</li> </ul>
R2	Create Support Materials, Guides, & Tools	INT	<ul style="list-style-type: none"> <li>•Cost figures based on estimated Employee Effort to complete activity and create learning materials</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Savings figures based on estimated decrease in Employee effort due to additional work from errors / mistakes</li> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
P1	Create Process Maps for Service-Related Operations	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Cost figures based on industry averages for external consultant deliver similar services.</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•Cost savings associated with this captured in R2</li> </ul>
P2	Develop Formal Service Agreements for Impacted Departments	INT	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity</li> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>
T1	Align AMANDA Planning & Design to Centralized Service	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Cost figures based on estimated external vendor fees (current vendor and industry averages)</li> <li>•Key Calculation Criteria: consultation rate, time required to design / build</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>
T2	Build SharePoint Site for Centralized Service Team	\$0- \$10,000	<ul style="list-style-type: none"> <li>•Leverage synergies with current project to design / build</li> <li>•Cost figures based on estimated employee effort to complete activity</li> </ul>	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Savings figures based on estimated decrease in employee effort due to locating information, handling follow-up calls due to misinformation, and additional work from errors / mistakes</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
			<ul style="list-style-type: none"> <li>•Key Calculation Criteria: Time to complete activity, average salary of employees involved</li> </ul>		<ul style="list-style-type: none"> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>
T3	Leverage “Planning” Customer Inquiry Portal as Interim CRM System	INT	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity. Effort for activity is impacted by the number of departments for creating portals (estimated to be 6)</li> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>	\$50,000 – \$100,000	<ul style="list-style-type: none"> <li>•Savings figures based on estimated employee time / effort associated with handling “follow-up” calls, coordinating with colleagues to gather information, and responding to customers.</li> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>
T4	Deploy Data Tracking & Management for Centralized Service	\$10,000 - \$50,000 (annually)	<ul style="list-style-type: none"> <li>•Cost figures based on increased license fees for IT systems to implement add-on functionality for tracking desired data.</li> <li>•Key Calculation Criteria: Mitel license fees, AMANDA license fees, number of users to system (who need license)</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
	<b>STAGE 2.0:</b>		•		•
S4	Operating Model of Centralized Service Team	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Cost figures based on design only renovations to centralized service desk within Town Hall and contact centre room / desks within Richard Recreation Complex.</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>
S5	Governance Structure of Centralized Service Team	\$50,000 – \$100,000	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee wages for 2 P/T Clerk employees</li> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>
R3	Service Team Roles & Responsibilities	INT	<ul style="list-style-type: none"> <li>•No significant costs</li> </ul>	N / A	<ul style="list-style-type: none"> <li>•No significant savings</li> </ul>
R4	Skills & Knowledge of Cross-Trained Service Team Members	\$10,000 – \$50,000	<ul style="list-style-type: none"> <li>•Cost figures based on industry averages for external consultant to deliver service specialized training</li> </ul>	\$10,000 - \$50,000	<ul style="list-style-type: none"> <li>•Savings figures based on 3rd party research into work productivity and engagement benefits of cross-skilled teams</li> <li>•Key Calculation Criteria: error-rate of employee, number of</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
					employees, number of tasks / contacts performed
P3	Fundamental Services Performed through Centralization	N / A	<ul style="list-style-type: none"> <li>•No significant costs</li> <li>•All related financial requirements for service centralization are incorporated into other recommendations</li> </ul>	\$160, 000 – \$285,000	<ul style="list-style-type: none"> <li>•Savings figures based on estimated Employee time / effort associated with handling transfers to Region. Streamlined process expects to simplify tasks and reduce effort.</li> <li>•Key Calculation Criteria: Time to complete activity, Average salary of employees involved</li> </ul>
T5	Modified Service Entry / Communication Channels for Centralized Service	\$10,000 - \$50,000 (annually)	<ul style="list-style-type: none"> <li>•Cost figures based on increased license fees for telephony / IT systems to implement add-on functionality for streamlining service channels</li> <li>•Key Calculation Criteria: Mitel license fees, AMANDA license fees, number of users to system (who need license)</li> </ul>	\$50,000 – \$100,000 (annually)	<ul style="list-style-type: none"> <li>•Savings figures based on estimated decrease in Employee time / effort associated with receiving direct contact for customer issues unrelated to their role and becoming involved in handling it.</li> <li>•Key Calculation Criteria: Time to complete activity, number of activities and Average salary of employees involved</li> </ul>

ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
	<b>STAGE 3.0:</b>		•		•
S6	Perform Feasibility Assessment for myDurham Partnership Opportunities	Licence fees not currently defined	<ul style="list-style-type: none"> <li>•Cost figures are dependent on how Clarington partners with the Region. This can vary significantly.</li> <li>•Key Calculation Criteria: IT Capital expenditure, License Fee</li> </ul>	Dependent on Partnership Level	<ul style="list-style-type: none"> <li>•Savings figures are dependent on how Clarington decides to partner with the Region. This can vary significantly.</li> <li>•Key Calculation Criteria: unneeded Capital expenditure, additional service employees, decreased time / effort of employees from outsourced activities</li> </ul>
P4	Complex Services Performed through Centralization	\$50-\$100,000	<ul style="list-style-type: none"> <li>•Cost figures based on estimated employee effort to complete activity.</li> </ul>	\$100K-\$235K	<ul style="list-style-type: none"> <li>•Savings figures based on estimating weighted average of defined savings in Stage 2.0 relative to the number and effort needs of recommended services here.</li> <li>•Key Calculation Criteria: Stage 2.0 centralized service savings, number of centralized services recommended in this stage, employee effort / time</li> </ul>



ID	Recommendation	Cost to Implement	Cost to Implement Rational	Cost Savings	Cost Saving Rational
T6	Additional Self-Serve Capabilities in Customer Portal	\$50,000 - \$100,000 (one-time)  \$10,000 – \$50,000 (annually)	<ul style="list-style-type: none"> <li>•Cost figures based on increased license fees for IT systems to implement add-on functionality for portal.</li> <li>•Key Calculation Criteria: AMANDA license fees, consult feed for design / build.</li> </ul>	\$100,000+  TBD	<ul style="list-style-type: none"> <li>•Savings figures based on estimated decrease in Employee time / effort associated with competing activities to deliver service</li> <li>•Key Calculation Criteria: customer utilization rate of portal, employee Time to complete activity, Average salary of employees involved</li> </ul>