

# Customer Service Strategy

May 2006

vision

## The City of Oshawa

Connecting Information and People

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## Acknowledgement

The City of Oshawa is commended for taking a leadership position and embarking on a journey that will redefine how customer service is delivered. In summer 2005, the City of Oshawa engaged RBosch Consulting to develop a Customer Service Strategy to define the direction for the future that will enhance the current level of service. This document outlines a customer service roadmap with goals, objectives and related strategies to become a leader in customer-centric government<sup>1</sup>. Some areas within the organization have made great strides in enhancing service delivery to the customer. The purpose of this report is to compliment the work that is already underway in the organization and establish a corporate approach to customer service.

In addition, RBosch Consulting would like to thank the staff and Council members who took part in the interviews and the Customer Service Working Committee for its time, expertise and feedback in the creation of the Customer Service Strategy. It has been a pleasure for RBosch Consulting to have been engaged for this project and I look forward to working with the City of Oshawa in the future.

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<sup>1</sup> Customer-centric government is an organization that focuses on the customer experience and places customers at the heart of its business.

## Introduction

Currently, the City of Oshawa serves a population of approximately 150,000 with an organization that is divided into three departments, plus the City Manager's Office, and has approximately 738 employees. Recognizing a desire to improve customer service, and become a leader in customer-centric government, the City of Oshawa identified that a customer service strategy was required.

Today, many organizations are faced with significant challenges in the area of customer service and service delivery, both internally and externally. The constant change in demographics coupled with high customer expectations is making organizations rethink its customer service strategies. Strategies and tactics that worked in the past are less effective and require more effort to execute. In an era where service has become a defining factor for customers, organizations of all types struggle to find the unique balance between delivery of a service, the cost of the delivery and customer expectations. Local governments offer multiple services and, in most cases, departments work independently though they may share business processes. However, the customer views government as a complete entity and makes no distinction between departments or business process. Generally, having several contact points or multiple locations offering government service may cause a barrier to efficient service delivery for citizens. As a result, service delivery strategies that worked in the past need to evolve to reflect changes in attitudes and expectations of customers. Governments are now under pressure to deliver a higher level of service at no or minimal cost increase to meet the growing expectations of its citizens.

In response to increasing customer expectations, the City of Oshawa developed the *Commitment to Progress* initiative. The corporate qualities (core competencies) and the guiding principles (specific behaviours) that foster a quality service culture are incorporated into the 2006 Corporate Business Plan. The framework creates a foundation of attitudes and behaviours that support the long-term success of the organization by committing to excellent customer service, positive/supportive working relationships, progressive leadership and continuous learning and improvements.

In February 2005, the City of Oshawa's Community Strategic Plan '***Creating Our Tomorrow***' was approved by Council, outlining the community vision, objectives and strategic direction for the next 15 - 20 years. The purpose for creating a Community Strategic Plan was to develop a common vision for the community, to establish a framework for other plans and partnerships, and to maximize resources in an effective manner. One of the goals for the City of Oshawa is to be a Caring and Responsive

Community and the objective is to improve communications, cooperation and community engagement. Communication to the public was identified as an important strategic initiative.

The 'Citizen First 3' survey, completed in 2002 by the Federal Government, identified the five drivers of customer satisfaction as timeliness; knowledgeable and competent employees; staff that is courteous and went the extra mile; the citizen was treated fairly; and got what they needed. Timeliness was not only the most important driver to improving customer satisfaction, but also the one rated lowest in performance by citizens. Service standards from the 'Citizen First 3' survey are:

- ⊙ Telephone: 97% of Canadians feel that thirty second wait on the telephone is acceptable; 76% of Canadians believe that a wait of one minute or more is unacceptable.
- ⊙ Waiting in Line: 98% of Canadians believe that waiting in line for two minutes is acceptable; 74% of Canadians believe that a wait of ten minutes or more is unacceptable.
- ⊙ E-Mail: 90% of Canadians feel that an e-mail message should be returned within four hours; 74% believe a reply the next day is unacceptable

Accessing government services has caused many problems for citizens. According to the 'Citizen First 3' survey, the telephone is the most frequently used method to contact the government, but satisfaction was rated low. Citizens have a difficult time identifying the correct telephone number in the blue pages and when they finally make the call, they find the phone line to be busy, end up in the endless loop of voicemail or the person who answers the phone indicates 'that is not my department'. Getting hold of the right people is a source of great frustration for citizens trying to access public services. In addition, citizens are looking to have multi-channels of communication with its government and still expect the same level of consistent, reliable, and friendly service delivery regardless of the method of contact.

To improve customer accessibility to City services and meet citizen expectations, all departments must come together to harness collective knowledge, creativity and initiative to provide outstanding service. Customer service excellence is no longer just the responsibility of the front-line staff, and must receive commitment at all levels within the City of Oshawa. In order to be truly customer-centric, an enterprise must integrate its entire range of business functions around satisfying the needs of the citizens while containing costs, leveraging technology and embracing a customer-service culture. Becoming customer-centric requires an organization to focus on processes that are customer friendly, staff that are dedicated to excellence in service delivery and customer communication.

## Approach

This report represents a customer service direction for the future that will enhance the current level of service for both internal and external customers. This document relates to customer service and takes a holistic approach to how the City can enhance service to its customers. In addition to this strategy, a high-level Contact Centre Implementation Plan that best meets the needs of the organization has been developed as a separate report.

In an effort to develop a comprehensive Customer Service Strategy for the City of Oshawa, the following activities were undertaken:

- ⊙ Meeting with the City Manager to receive direction on the project.
- ⊙ Meetings with the three Department Heads and their Directors to discuss the objectives for the Customer Service Strategy initiative.
- ⊙ Reference documentation was gathered - Community Strategic Plan, Citizen Satisfaction Results and Annual Report to Citizens.
- ⊙ Workshop with Working Committee representatives providing a step-by-step presentation of how to complete the Section Profiles. The Section Profiles were a mechanism to gather information about each department and the services they offer to customers. The profiles provide a snap-shot of the departments as well as help identify customer-facing services<sup>2</sup>.
- ⊙ Workshop with Working Committee representatives providing a step-by-step presentation on Business Process Documentation. The purpose of this process was to document how each customer-facing service was currently delivered from start to finish and to develop process maps for use in the development of a possible Contact Centre Implementation Plan.
- ⊙ More than 100 personalized face-to-face interviews were conducted with staff from all levels of the organization and across all branches. The interviews were designed to:
  - Gain insight into the level of commitment to customer service;
  - Identify current practices as they relate to customer service;
  - Identify customer service areas that are a challenge and may require improvements; and
  - Determine where any changes could be made to strengthen customer service.
- ⊙ Interviews with the Mayor and seven Councillors. The interviews were designed to:
  - Determine the level of commitment to support a customer-centric strategy;
  - Gather feedback on how they perceived customer service was provided today within the City;

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<sup>2</sup> Customer-facing services are all activities that have direct impact on customers.

- Identify customer service areas that are a challenge and may require improvements; and
- Determine where any changes could be made to strengthen customer service.
- ⊙ Gained consensus and agreement on guiding principles, success factors and prioritization of strategic goals, in collaboration with the Working Group Committee.
- ⊙ Meetings with 13 branches to observe work related activities. The branch observations were designed to:
  - Gather information on use of technology and identify opportunities for service delivery improvements;
  - Review channels of communication into the City, i.e. telephone, email and face-to-face services and provide alternative service delivery methods; and
  - Observe general customer service practises and identify areas that may require improvements.

## **Project Objectives**

The purpose of the Customer Service Strategy project is to:

- ⊙ Understand the current state of customer service and how it is delivered today.
- ⊙ Provide a framework or set of guiding principles within which decisions about customer service can be made.
- ⊙ Identify opportunities for customer service improvements.
- ⊙ Deliver a Customer Service Strategy that provides a roadmap for the organization.

## **Situational Assessment**

The development of a Customer Service Strategy is a good foundation upon which to build excellence in customer service, which is supported by Council, senior management and staff. The interviews revealed that 75% of staff thought that a Customer Service Strategy was essential for the organization. A Customer Service Strategy would help focus customer service excellence and make it part of the day-to-day corporate culture. Interviewees and Council rated the customer service provided by the organization to the public as good, achieving a seven on a scale of 10. The City of Oshawa employees deserve acknowledgement for the efforts and contributions they make when providing customer service. The organization has made some great strides to enhance service delivery to customers, for example:

1. The City of Oshawa has set forth on a journey to improve corporate effectiveness with the creation of the Community Strategic Plan '***Creating our Tomorrow***' outlining the goals, objectives and strategies of the community over the next 15 – 20 years.
2. Other initiatives are underway in the organization to improve service delivery, i.e. Re-branding Project, By-Law Enforcement Review, City Hall Corporate Advertising Policy, and City Hall Master Plan and Energy Management Retrofit.
3. Some e-services currently exist on the City of Oshawa's website that enhance service delivery to the citizens, for example:
  - i. Recreation Registration
  - ii. Payment of Parking Tickets
  - iii. Animal License Registration and Renewal
4. The creation of the City Staff Bus Tour helps familiarize new staff and Councillors with the City and its facilities, and provides information that will help better serve the public.

### **Organizational Gaps**

Gaps in the provision of customer service were identified through Council and staff interviews in the following six areas:

1. Corporate Culture
2. Decentralized Customer Service
3. Inconsistent Service Standards
4. Staffing Levels and Training
5. Inconsistent Process Documentation
6. Information & Technology

**Corporate Culture** can be defined as the attitudes, behaviors, values and personalities that make up an organization. Part of corporate culture is also the value the organization places on customer service excellence. Employees were indifferent and expressed they were unclear about the corporate mission regarding customer service.

The key findings are:

1. Every department has its own customer service practices.
2. Approximately 60% of staff interviewed were not aware of the Community Strategic Plan and did not understand how the Customer Service Strategy project fit with the larger corporate mission.



3. Numerous interviewees, when asked who their customers were, referred to external customers but failed to recognize that they also had internal clients.
4. There has been so much change within the organization over the last few years that many staff felt that this customer service project would be another initiative that would have little or no follow up.
5. The attitude most observed in the interviews was that of indifference and there was a feeling that employees were so busy completing day-to-day tasks that there was little time to make operational improvements.
6. When interviewees were asked if citizens could provide feedback on the service they received from the City, it became evident that the Customer Feedback Forms are seldom being used.
7. Approximately 90% of interviewees indicated that their immediate management team was committed to providing excellent customer service. However, it was perceived by staff that customer service was not seen as a top priority and the approach was inconsistent across the organization. Many interviewees felt that senior management did not always lead by example when it came to customer service excellence and held front-line staff to a higher standard.
8. A reoccurring challenge in customer service is that citizens often did not know who to contact about public service issues, for example, the Region versus the City.
9. Many staff indicated that when transferring a customer phone call it was frustrating trying to find a live person to take the call resulting in an endless loop of voicemails.

**Decentralized Customer Service** - At present, customers are required to know the internal structure of the City of Oshawa in an effort to reach the right department to make their request. Every branch in the City is organized such that they generally only provide telephone or counter service along areas of responsibility, however, the current organizational design causes challenges to citizens.

The key findings are:

1. Each branch provides its own individualized service delivery, as a result, customers may be required to visit multiple branches/locations to fulfill service requests. For example, to pay a tax bill the customer would visit City Hall, to pay a parking ticket the customer would visit the Mary Street Office, and to register for a recreation program, the customer would visit a recreation centre.

2. Transferring customers to multiple branches to have their questions answered is a common practice.
3. There are many 'mini call centres' and counters across the organization that are fragmented and provide un-integrated service delivery.
4. Information sharing between departments is limited. A list of frequently asked questions and answers is not provided to the front-line staff to better serve the customer. Front-line employees have little option but to transfer customers to the appropriate branches to have questions answered.
5. The many entrances into City Hall are not customer friendly. There is no main receptionist desk to greet customers. The physical layout requires customers to travel up and down elevators/stairs in order to get the service they are looking for within the building. To provide more effective service delivery, the customer-interface should occur at or near the ground level.
6. Currently, there is little integration of services between the City of Oshawa and other levels of government. For example, the City of Oshawa takes care of municipal roads and the Region of Durham is responsible for regional roads. If a request arrives in the Public Works area requesting a road occupancy permit for a regional road, the Customer Service Clerk will provide the phone number/address for the Region of Durham.
7. Contacting local government still involves finding the right number among the Blue Pages. Upon reviewing the Blue Pages there are approximately 55 contact points listed for City of Oshawa services.

**Inconsistent Service Standards** - Current customer service delivery practices in the City, evolved based on organizational structures. The existing service practices are based on the individual branch's understanding of various customers' needs. As a result, the level and consistency of service standards varies within the organization.

The key findings are:

1. Every department has its own expectations of how to treat customers and there is no harmonized service standard for customer service dealings across the corporation.
2. Although customer service practices are part of existing front-line roles (dealing with customers over the telephone and counter), these peripheral functions interrupt daily assigned work and lead to overall inefficiencies within branches.

3. While there are some individual program standards and performance measures taking place in the City of Oshawa (i.e. grass cutting schedule, Committee of Adjustment), in general, many branches do not have service standards and key performance indicators are not being measured. 'What you don't measure, you can't manage!'
4. When interviewees were asked "do you know if the corporation has customer service standards", about 50% said "I think so", but had no idea where to find them and what the standards were. The other half indicated that none existed, but the practice is to use common sense – 'treat people how you want to be treated'.
5. Currently, there is no standardized approach to telephone handling or the quality of service provided to the citizen. Customers are often passed around the organization with little regard for the person's need.
6. Standards for accessibility are not consistent within the City of Oshawa when providing services to customers that have a disability. For example, some counter heights do not accommodate wheelchairs and some of the signage in the City buildings is difficult to see for the visually-impaired.

**Staffing Levels & Training** – The key component in any organization today is people. Employees usually represent the greatest cost; they need to have appropriate customer service skills and must have the knowledge and expertise to meet the needs of the citizens. The two gaps that were identified in the organization were having the appropriate staffing levels to provide an adequate level of customer service and a lack of customer service training.

The key findings are:

1. Overall, customer service training has not been a high priority within the City of Oshawa based on interviewees. Seventy-four percent of interviewed staff has not received customer service training at the City of Oshawa.
2. Many interviewees indicated that training for new roles was done on the job, without any formalized process.
3. A complaint that was voiced numerous times was the lack of recognition of employees who have gone above the call of duty to provide an amazing customer experience. An interviewee indicated if you did something wrong you would know immediately...but good news stories were rarely communicated or acknowledged by managers.
4. Staff did not feel appreciated.

5. Numerous interviewees mentioned insufficient staff to enable branches to provide effective customer service. Approximately 45% of interviewees indicated that the lack of staff was a barrier to effective customer service especially during times of vacation, sickness, increased peaks in demands and coverage over lunch time.
6. There is little general awareness of an established protocol for Council-Staff interaction. When Councillors' receive complaints they may contact numerous different branches and staff to get the issue resolved, resulting in duplication of effort.

**Inconsistent Process Documentation** – Every business regardless of type operates as a collection of business processes. Each process starts with some type of a request and is completed with the delivery of a service. In some cases, the process may be administrative in nature and serve internal needs while other processes may serve external customers. Some processes are independent, while others are dependent on other processes and, possibly, other departments.

In general, documentation of new or existing business and service delivery processes at the City are limited. A gap was observed in the awareness level of business processes for services that are delivered where at least one other branch/department was involved.

The key findings are:

1. Roles and responsibilities were unclear within processes. Staff did what they felt needed to be done and this occasionally resulted in duplication of effort. For example:
  - a. Front-line staff records the complaint on paper/email and passes it to another colleague to input the information into branch specific software.
  - b. Event planning at the City has multiple branch involvement with limited coordination and no one area owning the complete process start to finish.
2. There is little to no information about what happens to process activities once they are transferred to another branch/department. Any activity outside of a department's 'sphere of influence' is an unknown entity. This problem is compounded because in many cases, there is no defined or formal owner of a business/service delivery process.

**Information & Technology** – For organizations to be effective, the right tools and technologies have to be in place and integrated, with the appropriate business systems, in order to deliver the most value. Some essential technological gaps were identified in the organization when dealing with customer service delivery.

The key findings are:

1. There are only a few branches that have stand-alone applications that track customer complaints, i.e. Building Services (OLI), Parks and Forestry (Peoplesoft) and Fire Prevention (Crysis). However, the organization lacks a corporate-wide system that enables the City to track service requests/complaints received by customers. Each branch strives to solve as many customer calls as possible on first contact, however, in cases where the employee is unable to solve the request/complaint, there is limited ability to assign the problem electronically for resolution. Follow up with customers to ensure that their requests were resolved in a satisfactory manner is not common place within the City.
2. Due to inconsistency in tracking customer service requests across the organization, it is difficult to evaluate the overall performance of the corporation with respect to customer service. Since customer service processes are generally un-coordinated and largely manual, there is limited ability to examine data and address global customer concerns.
3. The existing telephone infrastructure is quite old and needs to be upgraded. The current telephone system is not capable of providing reports and supporting a centralized contact centre environment.
4. There is not an overall internet strategy to leverage the website as a communication tool while engaging the customers in an interactive fashion by providing them with rich content and services.

## **Guiding Principles**

The City of Oshawa's ongoing Commitment to Progress Initiative established excellent customer service as a corporate quality. The four corporate principles that support excellent customer service are: we will be fair and honest; we will be courteous and helpful; we will be flexible and use common sense judgement; and we will use feedback to improve service. After interviewing staff and Council members across the organization and gathering their thoughts, ideas and attitudes, together with the Commitment to Progress, the following guiding principles were established for customer service excellence. These guiding principles, which reflect the vision of the Community Strategic Plan and the 2006 Corporate Business Plan, should be used as a framework for making customer related decisions, both internally and externally, and should be integrated into day-to-day business practices at the City.

**Customer Focused:** *Customer service excellence is our number one priority and focus.*

**Quality:** *We will provide professional, courteous, timely and accurate service to every customer in a fair, consistent and accessible manner.*

**Accountability:** *We are accountable to each customer and will use feedback to improve our performance.*

**Efficiency and Effectiveness** *We are committed to continuously measure and improve work processes by implementing innovative ideas, applying appropriate technology, training staff to be helpful and knowledgeable, and encouraging teamwork.*

### Customer Service Goals

A set of key goals, objectives and strategies have been developed that need to be implemented if the City of Oshawa is to enhance and evolve its customer service delivery. They are based on the situational assessment that was conducted to better understand existing customer service gaps within the organization and the guiding principles. They incorporate staff and Council responses as well as best practices in customer service delivery. The prioritization of the goals was established with assistance from the Working Group.

#### **Goal #1: Performance Measurement**

Without well defined corporate performance measurements it is difficult for any organization to communicate and manage the expectations of itself or its customers. A performance measurement structure identifies organizational goals, resources needed to achieve those goals, measures of effectiveness and efficiency (outcomes) toward the goals and drivers to achieve the goals. Creating meaningful measurements are useful in an organization to determine benchmarks, or setting service standards that provide a consistent basis for comparison.

Performance measurements assist an organization to think about the results they want and make staff accountable to achieve them. It optimizes operations as goals and results are more closely aligned. Service excellence would become part of the corporate culture and not just a one-time event that loses steam over time. In addition, performance measurement structure would bring about consistency in delivery of services to the customer experience.

**Objective:** *Corporate expectations are clarified by customer service standards, which provide the basis for measuring customer service performance.*

**Strategies & Actions:****a) Develop and Communicate Corporate Service Standards**

Meaningful service standards are goals the organization aspires to achieve. A set of well defined service standards should be developed and communicated to employees at all levels. This would clarify what the City expects and the image it wants to project to the public. The development of service standards brings consistency and reliability in delivery of services across the organization, the customer experience, and customer interaction. Service standard expectations should permeate all aspects of customer service in conjunction with a process that measures and manages compliance. Some typical customer service standards are:

- ⊙ The telephone will be answered within XX amount of rings.
- ⊙ Customers will receive acknowledgement of its voicemail messages within XX hours.
- ⊙ Customers will receive acknowledgement of its email messages within XX hours.
- ⊙ All incoming phone calls coming from external sources will be answered with a consistent greeting such as “Thank you for calling the City of Oshawa, this is Susan...how may I help you?”
- ⊙ Update staff voicemail message daily indicating date and availability.
- ⊙ Make eye contact with the customer within XX seconds of them approaching.
- ⊙ Always apologize if a customer is upset.

If service standard expectations are to be effective, they have to become part of the corporate culture. In the absence of any feedback mechanism, it is likely that an effort to integrate service standards into day-to-day business operations at the City, would fail. It is not simply about setting standards, but also about developing an organizational structure that brings about behavioral change within the corporation.

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Confirm all customer contact interaction methods</li> <li>⊙ Set customer-sensitive service expectations</li> <li>⊙ Develop, design, print and distribute materials to communicate the Customer Service Strategy and service standards to the organization/public</li> <li>⊙ Incorporate expectations into ongoing customer service training program</li> <li>⊙ Develop a measurement and feedback mechanism</li> <li>⊙ Incorporate adherence to standards into employee performance management</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Consistent service delivery</li> <li>⊙ Clear and formal expectations</li> <li>⊙ Accountability achieved</li> <li>⊙ Improve service quality and reliability</li> <li>⊙ Better customer interaction</li> <li>⊙ Organization viewed as a leader in public sector</li> </ul>

#### b) Establish Corporate Wide Reporting

Once the City of Oshawa establishes service standards, it would be necessary to track performance and report results. Corporate reporting provides feedback on the performance of the entire organization in meeting service standards and what actions may need to be taken in order to meet expectations. The continued use of the customer feedback should be assessed as part of this process. Regular reporting helps branches determine the effectiveness and efficiency of service delivery and recognize continuous improvement strategies in order to achieve necessary results.

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Evaluate key customer service activities within the organization to be measured and reported against customer service standards</li> <li>⊙ Report on results and identify areas for improvement</li> <li>⊙ Decide on public feedback mechanisms regarding customer service</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Improve service delivery and accountability</li> <li>⊙ Continuous mechanism for quality improvements</li> <li>⊙ Mechanism to help determine if sufficient resources are available to do the job effectively</li> </ul>



**c) Enhance the Exiting Staff Incentive Program**

Evaluate existing staff appreciation/incentive programs and develop a comprehensive corporate staff appreciation program to recognize and encourage those outstanding behaviors that lead directly to the accomplishments of the corporate goals and direction. This can effectively motivate performance, make staff feel appreciated and reinforce the behaviors that lead to corporate success. Happy employees make satisfied customers!

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Establish a committee to evaluate existing practices and develop a corporate program</li> <li>⊙ Determine appreciation criteria</li> <li>⊙ Develop Program</li> <li>⊙ Communicate the program to staff</li> <li>⊙ Implement and monitor</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Enhance customer service and customer focus</li> <li>⊙ Improve employee productivity and quality of work</li> <li>⊙ Recognize and promote positive behaviours that support corporate goals and objectives</li> <li>⊙ Consistency in the 'Thank you' process</li> </ul>

**Goal #2: Customer Service Development and Training**

Getting the right people with the right training is perhaps one of the biggest determining factors of how successful an organization is when it comes to the delivery of quality customer service. An organization must rely on its staff to deliver service results. This cannot happen if there is insufficient investment in training, development and encouragement of the people who are responsible for service delivery. The quality of City services is determined by having well trained, responsive, accountable and professional staff that would ensure a consistent approach to service delivery. Organizations that invest in its people would thrive in a customer driven environment in the future.

**Objective:** *Knowledgeable, consistent and responsive approach to delivery of customer service within the organization.*

**Strategy & Actions:****a) Develop a Comprehensive Customer Service Training Program**

The City should develop a comprehensive customer service training program for all levels of staff within the corporation. This program should be mandatory for existing staff and a requirement for new employees so that the service expectations and delivery becomes

consistent across the corporation. The training program should be built around specific requirements of the various levels of employees (front-line, supervisors/managers, senior management and Council). The future success of the organization would depend on increasing staff's ability to develop and enhance capabilities to deliver superior customer service, both externally and internally. One of the foremost ways to see improvements in customer service is through continuous customer service training within the organization. A training program enhances not only customer service, but also teamwork and communication, and management understands its role in service delivery.

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Develop the scope of training based on the number of staff, core competencies and skill deficiencies               <ul style="list-style-type: none"> <li>a. Front-line Staff How to provide “dazzling” customer service, build and maintain customer relationships, active listening, conflict resolution, etc.</li> <li>b. Supervisors/Managers How to mentor, coach, provide constructive feedback and develop competencies as well as recognize good customer service delivery</li> </ul> </li> <li>⊙ Develop a list of frequently asked questions and answers for front-line staff.</li> <li>⊙ Develop and establish an internal program structure that will deliver the training on an ongoing basis</li> <li>⊙ Develop and seek responses for a training RFP</li> <li>⊙ Engage vendor to conduct training</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Consistent customer service</li> <li>⊙ Increase in morale &amp; sense of value by employees</li> <li>⊙ Enhance service delivery and customer focus</li> <li>⊙ Better customer experience</li> <li>⊙ Enhance corporate image and reputation</li> <li>⊙ Enhance competency levels internally</li> <li>⊙ Increase staff effectiveness</li> <li>⊙ Accountability achieved</li> </ul>

### **Goal #3: Information and Technology Access/Process Documentation and Streamlining**

Today, leading governments are changing both the perception and the reality by giving top priority to the customer when undertaking service enhancement initiatives. They do not make change just for the sake of change; they do it to enhance service to its customers. The fundamental building blocks of organizations are the collection of business processes that move requests from the customer to actual service delivery. Identifying customer-facing business processes, its dependencies on other

organizational processes and streamlining them to be more efficient would translates into better business practices and customer service. Also, information technology plays a critical role in the execution of business goals, objectives and strategies. As business strategies and objectives evolve to accommodate the changing needs of customers, new technologies must be implemented that ensure easy access to City services that are delivered in a consistent and accurate manner. Organizations are realizing that in order to enhance effectiveness and efficiency, improved business processes are required and the right tools and technologies must be integrated with existing infrastructure.

**Objective:** *Strategic use of the internet and technology, and process documentation and streamlining to better deliver information, communications and services to customers.*

### **Strategies & Actions:**

#### **a) Develop an Intranet and Internet Strategy**

Transforming an organization to become more customer-centric, involves an increased focus on communication. Information must be shared with the public and internal stakeholders in an effort to improve customer service. The easiest way to improve communication is by embracing such technologies as the intranet and internet and making them part of an overall customer service strategy. Enabling e-services that promote self-service can bring about efficiencies within organizations, if managed properly. The corporate website can be used as an additional channel for service and information delivery and should be part of a larger Corporate Communication Strategy. Internet messaging must be strategically viewed as a tool that can foster closer relationships by providing citizen's information and services on demand (essentially keeps the City open 24 hours a day/7 days a week). The Internet can also serve to clarify responsibility for public services between the City and the Region of Durham.

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Work with Corporate Communications and the Web Committee to establish short-term and long-term objectives</li> <li>⊙ Develop a mechanism to gather internal and external requirements related to the website</li> <li>⊙ Implement the strategy</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Another channel for delivery of City information and on-line services</li> <li>⊙ A vehicle that can be used to share information with the City/public</li> <li>⊙ Provides information and services 24X7</li> <li>⊙ Serves as a feedback or performance measurement tool</li> </ul>

### **b) Acquire and Implement Customer Request Management Software**

Customer request management software is not an application specific to a contact centre, but is a tool that enables organizations to manage customer service requests more effectively. It is, however, a fundamental component of a Contact Centre. The City of Oshawa requires a corporate wide software application that can track and record customer concerns in a consistent and efficient manner. Implementing request management software is truly transformational technology. It requires a great deal of analysis of current processes and streamlining of procedures to provide service delivery transparently to the customer. A customer tracking software would improve the effectiveness of the organization and assist in corporate reporting.

<b>Actions</b>	<b>Benefits</b>
<ul style="list-style-type: none"> <li>⊙ Create RFP for the Customer Request Management (CRM) Software</li> <li>⊙ Acquire and implement software solution</li> <li>⊙ Establish corporate reporting requirements</li> <li>⊙ Train Staff</li> <li>⊙ Implement new processes</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Enhance customer focus</li> <li>⊙ Clear accountability for service delivery</li> <li>⊙ Service expectations are clear</li> <li>⊙ Consistency in service delivery and quality</li> <li>⊙ Improve reporting capabilities</li> <li>⊙ Increase efficiencies and effectiveness</li> <li>⊙ Software infrastructure requirement for a Contact Centre</li> </ul>

### **c) Upgrade Telephone Infrastructure**

Today's organizations face constant pressure to improve the customer experience. To enhance the quality of the customer telephone interactions, the City of Oshawa should invest in upgrading the existing telephone system. An upgraded system must be responsive, flexible and enable a consistent level of service wherever the customer contact is made, regardless of the branch location. A new infrastructure must be capable of providing a reporting function, as well as supporting any future customer service initiatives (i.e. contact centre). An overall telephone infrastructure strategy must account for the needs of the customers while

integrating with the existing telephone system and providing efficient, reliable and consistent telephone access.

<b>Actions</b>	<b>Benefits</b>
<ul style="list-style-type: none"> <li>⊙ Create RFP for Telephone Software</li> <li>⊙ Acquire and implement software solution</li> <li>⊙ Establish corporate reporting requirements</li> </ul>	<ul style="list-style-type: none"> <li>⊙ More responsive to customer needs</li> <li>⊙ Consistency in call handling</li> <li>⊙ Improve reporting capabilities</li> <li>⊙ Improve efficiency and effectiveness</li> <li>⊙ Software infrastructure requirement for a Contact Centre</li> </ul>

#### **d) Undertake Process Documentation and Streamlining**

By documenting how things are done currently, everyone involved in the process is better able to understand how all the steps fit into the larger picture of delivering service to the customer. Once the direct customer interaction services are documented; analyzing and streamlining business processes would be imperative to provide services transparently to the citizens. This means abandoning long-established procedures and looking at processes with fresh eyes to create new service delivery with the customer in mind. Streamlining business processes also means revising multiple customer touch points, managing changes across different departments to ensuring behavioral and cultural transformation. In 2006, the City is planning to commence with a Program Review Project, which would closely link with the Customer Service process documentation and streamlining strategy.

<b>Actions</b>	<b>Benefits</b>
<ul style="list-style-type: none"> <li>⊙ Document all customer interaction activities and process map workflow</li> <li>⊙ Analyze and restructure processes to be more streamlined and simplistic</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Enhance service delivery</li> <li>⊙ Customer focused</li> <li>⊙ Predictability</li> <li>⊙ Reliability and accountability</li> <li>⊙ Streamline processes to be more effective</li> <li>⊙ Transparency for the customer</li> </ul>

**Goal #4      Centralized Customer Service**

As customers become more mature in their expectations, organizations at all levels are shifting focus to becoming more customer-centric. The customer experience and quality of interaction has become the order of the day and organizations have had to look within to realign its customer processes and re-think its service delivery strategies, structures and methods to be more effective.

In order for the City of Oshawa to better serve a range of client needs, the establishment of a centralized customer service model should be developed, in which a variety of services are integrated and can be accessed from a centralized location. Citizens think about government as a whole and do not care, which department performs a service, as long as it is performed well. Citizens want services to be more accessible and convenient. Centralizing service delivery would simplify access across multiple channels, and deliver consistent and efficient service. With this new delivery model, a protocol would be established for Council-Staff interactions which would allow Council to forward customer requests to one centralized location that would track and dispatch to the appropriate department for resolution, eliminating duplication of staff effort.

**Objective:** *Organizational focus on centralized service delivery that is efficient and easy to access for the customer.*

**Strategy & Actions:****a) Establish a Contact Centre**

A contact centre is a centralized multi-channel, front-line service delivery provider that would enhance the customer experience. The contact centre provides service for any type of contact, whether it is telephone, in-person (counter), email, fax, internet and mail. The transition from a decentralized and un-integrated service delivery method, to a centralized and integrated service model would provide economies of scale by migrating customer interaction activities into a single location. To provide effective service delivery, the customer-interface should occur at or near the ground level of City Hall. In addition, the City Hall Master Plan should take into account the need for counter heights to accommodate wheelchairs and signage should consider the visually impaired. Cost control may be achieved by having structures and systems in place that may avoid hiring more resources, yet still provide expected levels of service delivery.

Employees working in a contact centre must be well trained, and have the right tools, processes and information so that they are empowered to help the customer.

A contact centre would take ownership of the customer contact to ensure customer satisfaction while diminishing the impression that the staff is 'passing on the problem'. Through a customer request management system, the contact centre staff would contribute to the implementation of streamlined business practices reducing the time, steps and resources needed to initiate and complete service responses. The staff would track customer requests and provide reporting of service problems or issues with municipal property, services or infrastructure and assist in the resolution of problems. In addition, employees in the contact centre would follow up with residents to ensure requests are resolved in a timely fashion and the resident is satisfied.

A centralized contact centre lends itself to the implementation of an easy-to-remember number. Many cities in the United States and a few in Canada have implemented 3-1-1 as an opportunity to transform its service culture, processes and relationships with its customers. However, there is a cost to the municipality to implement and maintain the 3-1-1 service. The City of Oshawa can achieve the same quality of service by advertising an easy to remember customer service phone number without incurring any additional costs, for example, **905-7 os – hawa**. The other option is to have all existing City of Oshawa service telephone numbers channeled to the contact centre.

A Contact Centre Implementation Plan will be created for the City of Oshawa that will present a centralized service delivery model that best meets the needs of the customers, and a road map for implementation.

Actions	Benefits
<ul style="list-style-type: none"> <li>⊙ Refer to the Contact Centre Implementation Plan</li> </ul>	<ul style="list-style-type: none"> <li>⊙ Increase customer focus</li> <li>⊙ Single point of contact for multiple services</li> <li>⊙ Increase accountability for service delivery</li> <li>⊙ Improve quality of customer experience</li> <li>⊙ Ease of access for citizens</li> <li>⊙ Advocates for the customer</li> <li>⊙ Service standards and performance measures</li> <li>⊙ Gain efficiencies within the organizations</li> <li>⊙ Cost effective means for providing customer service</li> <li>⊙ Customer-centric by bundling multiple services to the public</li> <li>⊙ Reporting capabilities</li> <li>⊙ Change in corporate culture</li> </ul>

### Critical Success Factors

To become a leading customer-centric organization and achieve the goals in this Customer Service Strategy, there are five key success factors that are necessary:

1. **Senior Management & Political Support** ~ cultural change is required to have a customer-centric organization and this requires complete support from the senior management team to and the Mayor and Council.
2. **Adequate Resources** ~ in order for customer service initiatives to be successful, the commitment of adequate human resources and funding must be provided.
3. **Staff Buy-In and Communication** ~ transitioning to a new customer service delivery model requires staff to have a good understanding of the program and should be active participants in the process. If change is to be embraced, then it must be communicated to staff and the unions.



4. **Clear Vision** ~ the organization needs to know what the transformed organization would look and work like. This is a critical step and would serve as a guide for decisions that would be made in the future.
5. **Enabling Technology** ~ to evolve to a customer-centric organization would require information and technology support to be effective and efficient.

This customer service strategy would help the City focus on one of its core competencies – service delivery. Responding to client needs promptly and adapting quickly to changes in a cost effective way is crucial for success, especially when faced with the fast-paced municipal environment.

### **Future State**

The implementation of the recommended customer service goals, with the related objectives, strategies and actions, would create a customer-centric corporation that looks at service delivery from the customer's perspective. This means that all processes are designed with the customer in mind. A culture of customer service excellence ensures everyone in the organization, from the top down, believes they work for the customer. Empowering employees to make customer service decisions and look beyond the branch to the success of the entire organization is key to customer-centric government. Customer service excellence requires an investment in people and leverages technology to manage customer-oriented processes. Employees are given the right tools, training and development to ensure the customer feels important and satisfied with the service received by the City. Customer service expectations are clearly established and communicated to all staff to ensure consistency in service delivery. Establishing a centralized and integrated service delivery model enables the City to be more responsive, accountable and provide ease of access to City services. The value for centralized service delivery is improved access to government services, better information to proactively manage customer-oriented decision making and greater efficiencies for the corporation.

### **Next Steps**

The customer service strategy goals should be executed by the City to bring about a customer-centric approach to government. Such efforts often involve focused resources (both financial and non-financial) and require a structure so that progress can be managed. The following summary documents the priority, effort, approximate cost and impact of each of the recommended strategies per goal. It should be noted that estimated cost impacts may be less if the City develops the strategies in-house or if reserves or operating budgets can provide the necessary funding.

<b>Strategies</b>	<b>Effort</b>	<b>Approx. Costs (000's)</b>	<b>Impact</b>
<b>Goal #1: Performance Measurement</b>			
1a. Corporate Service Standards <sup>3</sup>	2 - 3 months	\$10 - \$15	High
1b. Corporate Wide Reporting of Customer Service Standards	12+ months	nil	Medium
1c. Enhance the Existing Staff Incentive Program	2 – 3 months	\$8 - \$10	Medium
<b>Goal #2: Customer Service Development and Training</b>			
2a. Comprehensive Customer Service Training Program	4 - 6 months	\$150 - 200	High
<b>Goal #3: Information and Technology Access</b>			
3a. Corporate Intranet and Internet Strategy	6 - 8 months	\$50 - \$80	High
3b. Customer Request Management (CRM) software with a knowledge management module	8 - 12 months	\$150 - \$200	High
3c. Upgrade Telephone Infrastructure	4 - 6 months	\$125	High
3d. Business Process Documentation	6 – 8 months	\$40 - \$50	Medium
<b>Subtotal</b>		<b>\$533 - \$680</b>	
<b>Goal #4: Centralized Service Delivery</b>			
4a. Contact Centre <sup>4</sup>	10 – 15 months	<b>\$445 - \$655</b>	High
<b>Total Estimated Costs</b>		<b>\$978 - \$1,335</b>	

<sup>3</sup> Development and production of staff materials

<sup>4</sup> Cost for the Contact Centre project Phase I and III does not include the Customer Request Management software and upgraded Telephone System as these costs were included in the customer service strategy. However, these two systems would be necessary for the successful implementation of a contact centre.