

To: Corporate and Finance Services Committee

From: Tracy Adams, Chief Administrative Officer,
Office of the C.A.O.

Report Number: CF-25-45

Date of Report: September 3, 2025

Date of Meeting: September 8, 2025

Subject: Customer Service Strategy 2025-2029 - Putting Customers
First: Oshawa's Strategic Approach to Exceptional Service

Ward: All Wards

File: 03-05

1.0 Purpose

The purpose of this report is to present the new Customer Service Strategy: “Putting Customers First: Oshawa’s Strategic Approach to Exceptional Customer Service”, (“the Strategy”) and to respond to previous Council direction regarding Service Oshawa resident inquiries (CORP-21-65) and the reporting of parking complaints (SF-24-02).

Attachment 1 is the Customer Service Strategy “Putting Customers First: Oshawa’s Strategic Approach to Exceptional Customer Service”.

2.0 Recommendation

That the Corporate and Finance Services Committee recommend to City Council:

1. That based on Report CF-25-45, dated September 3, 2025, the Customer Service Strategy “Putting Customers First: Oshawa’s Strategic Approach to Exceptional Customer Service”, as outlined in Attachment 1 to said Report be approved; and,
2. That any future operating and capital budget considerations requiring Council approval, be presented as part of any future budget submissions as part of the City’s regular budget planning process or separate reports as appropriate; and,
3. That the two Notices of Motion as outlined in CORP-21-65 and SF-24-02 be received for information as they have been addressed in this Report.

3.0 Input From Other Sources

- Blackline Consulting
- Community and Operations Services
- Corporate and Finance Services
- Economic and Development Services
- Safety and Facilities Services
- Corporate Performance and Strategic Initiatives
- External Customer Surveys
- Municipal Benchmarking: Burlington, Coquitlam, Kitchener, Mississauga, Regina, Waterloo

4.0 Analysis

4.1 Background

At its meeting of May 17, 2006, Council endorsed Oshawa's first Customer Service Strategy: "Connecting Information and People" as a guiding document in the City's evolution to a customer-centric organization. The strategy provided a foundation upon which to build excellence in customer service and through a phased-in approach to our centralized customer contact centre, Service Oshawa was launched on April 28, 2008. Since that time, Service Oshawa has been the main point of contact for many City services through various channels including in-person, telephone, live chat and Service Oshawa Online.

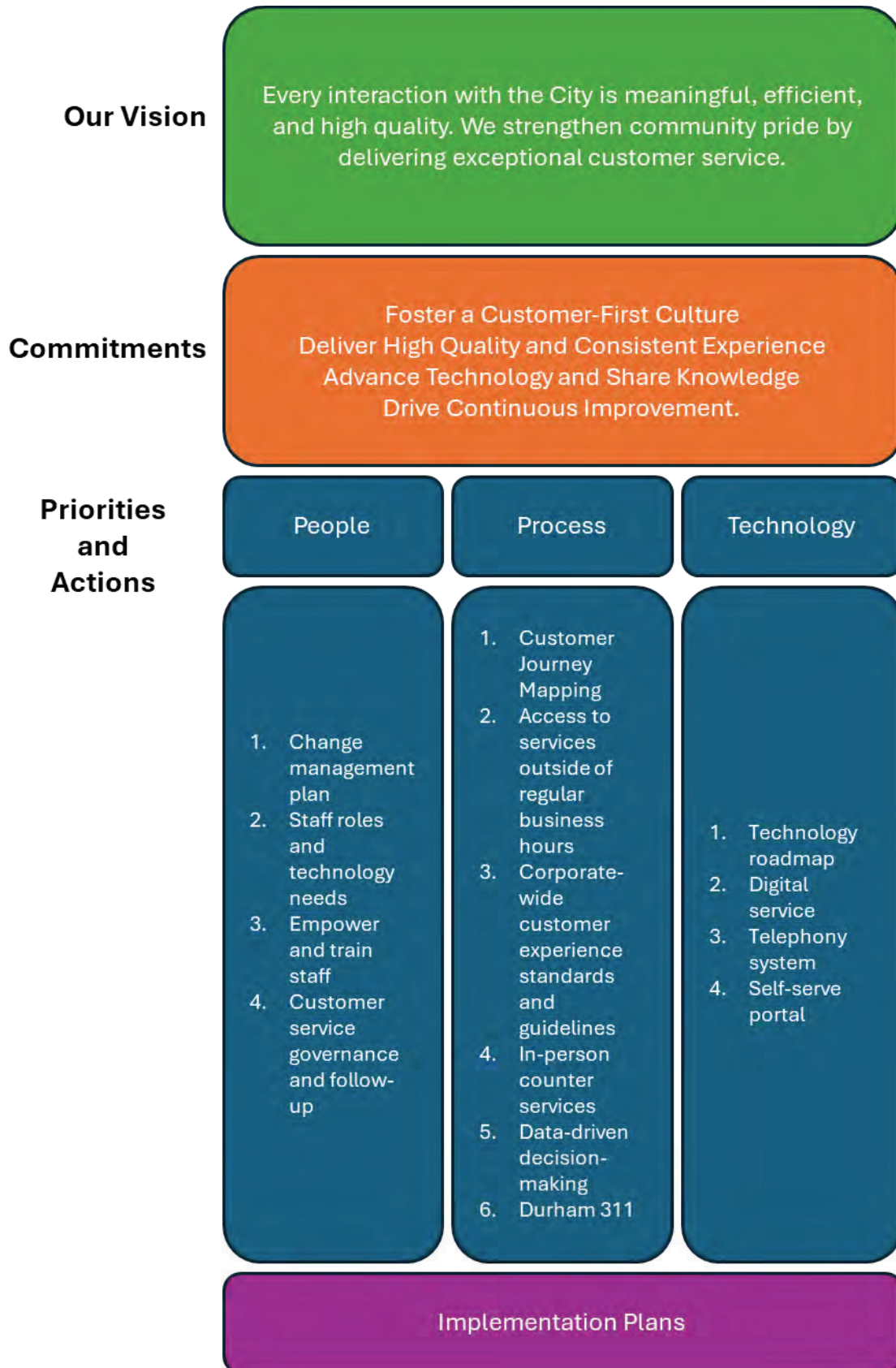
Throughout the years more services were transitioned to Service Oshawa, resulting in significantly higher interactions. The increased demand on services and expectations from customers related to the level of responsiveness and consistency in the experience they received each time they interacted with the City, led to modernizing our Customer Service Strategy. In January 2023 as part of the budget process, Council approved funding to engage a consultant to update the Customer Service Strategy. Blackline Consulting was engaged to identify gaps in the current service delivery model and develop a framework for modernizing how we deliver customer services to provide customers with a better customer experience when interacting with the City.

4.2 The Strategy

The process for developing the Strategy included a series of consultations with external customers, internal staff and members of Council. Through the consultations we gained valuable insight into the needs and expectations of the customer. In addition, data analysis, process shadowing and municipal peer reviews were undertaken.

The Strategy (refer to Attachment 1) identifies 14 actions, along with an implementation plan, to better the customer experience. The actions are broken into three categories: People, Process and Technology. Figure 1 outlines our vision, commitments, priorities and actions to ensure that every interaction with the City is meaningful, efficient, and of high quality.

Figure 1: Putting Customers First Framework



4.2.1 Customer First Approach

In 2024, staff visited the City of Kitchener for a tour of their City Hall Service Centre. Their approach is to have in-person services required by the public on their main floor. Staff representing various areas of expertise, are assigned for the day/week to perform their daily duties in the Service Support Centre with the expectation that they are available if/when a customer requires the service of multiple Branches instead of having to move to several different areas of the building.

Our Customer First approach will mirror that of the City of Kitchener facilitating services for customers from other areas such as Planning, Engineering, Licensing, Tax, Municipal Law Enforcement, etc. on the main floor of City Hall. The planning for this integration of services will commence in early 2026.

To further enhance our customers' ability to access services outside of business hours, the continuous advancement of technology through the Customer Relationship Management (CRM) system upgrade and telephony upgrade will enable the City to provide more 24/7 services utilizing the new technology. Using newer online and telephone technology to our advantage is most cost efficient and does not require additional staffing. Staff will continue to investigate other potential types of technology such as an Oshawa App to continue those advancements.

These types of continuous advancement in technology enables better reporting capabilities to allow better tracking of trends, service levels and for auditing purposes to ensure standards and targets are being met across the organization.

In addition, to assist Members of Council with facilitating matters brought forward by their constituents, a staff liaison, the Councillors' Administrative Assistant will have access to the CRM to enter service requests/complaints on behalf of a member of Council and interact with the necessary departments to gain further insight on issues when required and to follow-up on the status of the matter.

4.3 Previous Council Direction

4.3.1 Service Oshawa Resident Inquiries

At its meeting of November 22, 2021, Council referred the following Notice of Motion (CORP-21-65) to staff:

- "1. That the procedures regarding inquiries made to Service Oshawa be amended to require that the operational department receiving a referral from Service Oshawa shall contact the complainant resident within 48 hours (business days only) outlining the actions to be taken on the inquiry, and the projected time to resolve it; and,
2. That the procedures regarding inquiries made to Service Oshawa be amended to require intake staff to provide to the complainant resident, the names and contact information of their respective ward Councillors during the intake of the inquiry; and,

3. That the procedures regarding inquiries made to Service Oshawa be amended to require intake staff to ask the complainant resident if they wish to waive their right to privacy under M.F.I.P.P.A. and have their contact information passed on to the ward Councillors, and that if they agree to do so, that the waiver be added to the inquiry file.”

4.3.1.1 Part 1 of the Recommendation

This direction will be addressed in the Customer Service Strategy as part of Action 4 which is to strengthen customer service governance and follow-up, and Action 7 which is to update corporate-wide customer experience standards and develop guidelines and policies for all customer interactions. Detailed information is provided on pages 27 and 32 of Attachment 1. As part of these action items, the current Customer Service Standards will be updated and corporate-wide customer service training will be provided to all staff, reinforcing the importance of customer excellence across the organization. Additionally, these new standards will be achieved with the upgraded technology.

4.3.1.2 Part 2 of the Recommendation

Staff do not recommend implementing this recommendation. Implementing this direction may create inefficiencies and has the potential to create confusion as to who has oversight of the complaint and who will follow-up with the resident. Depending on the type of complaint, e.g. by-law enforcement, there is the potential for the member of Council to be in contravention of the Enforcement By-law as members of Council are not to get involved in enforcement matters.

4.3.1.3 Part 3 of the Recommendation

Staff do not recommend proceeding with this recommendation. According to the Information and Privacy Commissioner of Ontario, privacy is a fundamental right for all Ontarians and essential to the enjoyment of other basic freedoms. Public institutions are legally required to protect personal information and adhere to strict rules when collecting, using, or disclosing it.

Individuals must be fully aware of the potential impact on their personal information and the implications of waiving their privacy rights. A waiver of rights is only valid if the individual provides informed and meaningful consent. To meet this standard, consent must be given in writing and submitted via email to Service Oshawa staff.

Staff are not qualified to provide legal advice on matters of consent. Individuals should seek independent legal counsel to determine whether waiving their privacy rights is appropriate in their situation. Furthermore, this requirement would slow down the intake process and may delay responses to resident complaints.

4.3.2 Reporting Parking Complaints

At its meeting of January 29, 2024, Council referred the following Notice of Motion (SF-24-02) to staff:

“Whereas the City is developing a customer service strategy to identify service delivery gaps and look at potential ways to modernize ways to serve the public; and,

Whereas Blackline Consulting has been engaged to help lead the strategy; and,

Whereas the public and Oshawa Council members have found the current required process to report parking complaints by phone causes delays and lost time; and,

Whereas there are benefits to reporting parking by-law non-compliance with the option of permitting a photo email to Service Oshawa;

Now therefore Council recommend to Blackline Consulting and City staff to include a new process option for reporting parking non-compliance with a picture email to Service Oshawa.”

This direction is addressed under Action 12 – Expand and promote digital service options and reporting. A review will be conducted to determine additional services that can be included in the self-serve portal. During this process, the operational requirements and needs of the respective branches responsible for handling the requests will be reviewed and taken into consideration.

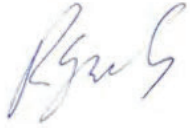
5.0 Financial Implications

There are no financial implications associated with the recommendations contained in this report.

Any financial implications associated with the implementation of the Customer Service Strategy will be brought forward through future reports or as part of the budget process.

6.0 Relationship to the Oshawa Strategic Plan

This report responds to the Oshawa Strategic Plan Priority Area “Lead: Governance and Service Excellence” with the goal to expand, embed, and modernize customer-centric service delivery.



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Putting Customers First : Oshawa's Strategic Approach to Exceptional Service

**City of Oshawa
Customer
Service Strategy
2025 - 2029**

September 2025

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1. Executive Summary

Oshawa is growing and changing, and so are the needs of our customers. While customer satisfaction is high, there is a continued need to enhance and modernize how we (the City of Oshawa) approach customer service. Our goal is to create exceptional customer experiences that meet the evolving needs of our diverse community.

The process of developing *Putting Customers First: Oshawa's Strategic Approach to Exceptional Service* included consultations with internal staff, members of Council, external customers and peer municipalities. There was also process shadowing and data analysis conducted.

This research identified six key outcomes that form the foundation for this strategy:

1. Establish clear customer service objectives and benchmarks to guide corporate performance.
2. Equip staff with advanced technology to enable a more complete 360° view of customer interactions.
3. Implement comprehensive training programs to maintain uniformity for the customer experience.
4. Integrate customer experience insights into the evaluation of operational procedures.
5. Guarantee timely and accurate information delivery to customers following service expectations and established standards.
6. Standardize reporting protocols for staff and members of Council to improve data accuracy and reliability.

Putting Customers First charts our path to a high-quality and consistent customer experience no matter who they connect with in the municipality.

The vision and commitments provide a unified framework for customer-first service (Figure 1). The vision and four (4) commitments are supported by three (3) priorities – people, processes and technology, and fourteen (14) actions and an implementation plan to guide our staff through this progressive approach to customer service delivery. The strategy's implementation will demonstrate to our customers that we are responsive and committed to customer needs, adaptable to future challenges, and offer proactive support.

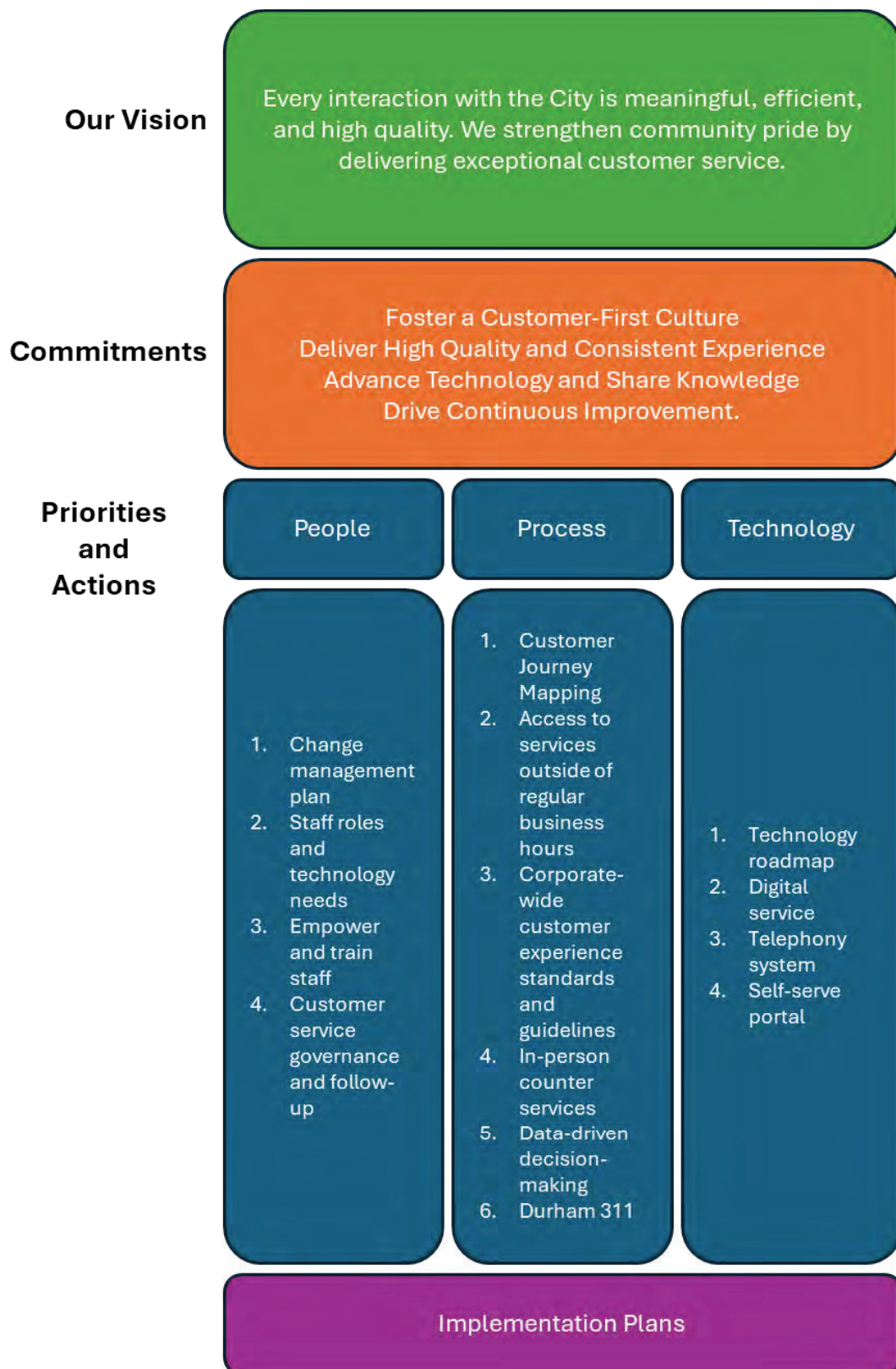


Figure 1: *Putting Customers First* framework.

2. Introduction and Background

Oshawa is growing and changing, and so are the needs of our customers. While customer satisfaction is high, there is a continued need to enhance and modernize how we (the City of Oshawa) approach customer service. Our goal is to create exceptional customer experiences that meet the evolving needs of our diverse community.

Our Journey So Far

We have put in place several initiatives at the forefront of customer service innovation:

- In 2008, we launched Service Oshawa (SO), marking a transformative approach to municipal service delivery. It centralized various services into a single contact point, enhancing accessibility and efficiency for residents. This initiative reflected a forward-thinking attitude and set a precedent for other municipalities, including:
 - Providing multiple channels through one point of contact for many city services, often with staff meeting customer needs fully during the first call (first-call resolution).
 - Implementing a comprehensive Customer Relations Management (CRM) system to monitor and handle service requests while providing data and analysis about customer needs to guide staff and decision-making.
 - Continuously improving business processes while introducing new services.
 - Establishing a specialized Customer Service Representative role equipped with the necessary skills to serve as a customer advocate.
 - Simplifying access to information and assistance for residents eliminates the need to navigate various departments.
- Since 2008, we have completed several initiatives, including:
 - Implemented a language line translation service.
 - Expanded operating hours from the standard 8:30 a.m. until 4:30 p.m. Monday to Friday to 8:00 a.m. until 6:00 p.m. Monday to Friday and 9:00 a.m. until 1:00 p.m. on Saturday.
 - Launched Live Chat.
 - Implemented Service Oshawa Online - Enabling residents to independently manage certain services by launching an online service request portal.
 - Providing the Commissioner of Oath service at the Service Oshawa counter.
 - Developed and launched a Civil Marriage Ceremony Program.
 - Introduced additional business units such as Municipal Law Enforcement & Licensing Services, Recreation Services, Engineering Services and Fire Services to Service Oshawa.

Putting Customers First: Oshawa's Strategic Approach to Exceptional Service

- Developed and implemented a Complaint Management and Resolution Policy.
- Participated and implemented online forms for many services across the organization.
- Participated in the launched new and improved systems such as Intelligenz Solutions, Maximo and CityView to name a few.
- In 2025/2026, we are upgrading our CRM Software to provide enhanced digital tools for self-service and interaction with the City, improved reporting capabilities, and information sharing with internal staff.

These steps have created a solid foundation for customer service today. However, a lot has changed since these initiatives have been underway. With technological advancements, today's customers increasingly expect to be heard, appreciated, and valued. They seek a seamless, convenient, responsive, inclusive and accessible service across all channels.

Benefits of Developing a Customer-First Approach

We are adopting a customer-first approach to developing exceptional customer service. This means that we place the customer – residents, businesses, collaborators, visitors and internal partners at the centre of our decision-making processes. Table 1 shows why:

Table 1: Benefits of creating a customer service strategy.

Benefits	
	Exceptional customer service meets new and growing expectations, reduces risk and strengthens public trust. According to Citizen First 2023: National Report, community members are looking to have confidence that their inquiries and issues will be resolved promptly through web or telephone access.¹ Creating a unified customer experience framework addresses these expectations and identifies how the municipality can meet customers' needs quickly. According to McKinsey & Company, satisfied customers are nine times more likely to trust their service provider. In contrast, dissatisfied customers are twice as likely to express dissatisfaction publicly. Fostering high-quality customer experiences is central to building trust and managing reputational risks.²

¹ The Institute for Citizen-Centred Service, Citizens First 2023: National Report, 2023, p.6.

² McKinsey & Company, The global case for customer experience in government, September 2019. <https://www.mckinsey.com/industries/public-sector/our-insights/the-global-case-for-customer-experience-in-government>. Accessed October 2024.

Benefits



Exceptional customer service provides a competitive advantage.

High quality and consistent service differentiates the City. The Economic Development Strategy highlights Oshawa as an important regional administrative and service hub, contributing to the city's employment activity.³ Positive customer experiences enhance our reputation and build trust, making Oshawa attractive to all customers and potential investors who value responsive and reliable city services.



Customer service that supports corporate strategic goals.

In 2023 as part of the budget process Council approved funding to develop a new customer service strategy to identify service delivery gaps and look at potential ways to modernize ways to serve the public. The Corporate Information Technology Strategic Plan also recommended expanding digital services, including the types of service requests that can be handled online, digitizing City forms, online payments and bookings, online permitting, licensing and planning services.⁴ Oshawa's Strategic Plan highlights the development of a customer service strategy as a key action.⁵ The City's continuous improvement framework leans towards ongoing continuous review of processes, policies and procedures. Integrating customer service into the strategic framework is essential for accomplishing our overarching goals.



Efficient resource use and data-driven decisions improve outcomes.

Technology is important in ensuring a seamless, efficient, and cost-effective customer experience. As noted in the Corporate IT Strategic Plan, "Good technology supports and enables great customer service, but it also supports the cost-effective delivery of city services."⁶ As we evolve service delivery, these tools provide us with data and analysis to support decision-making. We will be better equipped to meet customers' needs by implementing technology enhancements.



Empowered staff improve customer service outcomes, too.

Staff are at the frontlines of customer service. They directly shape each experience and serve as the face of the organization. Their knowledge and ability to support customers are key to the public leaving an experience

³ Avis & Young. The City of Oshawa Economic Development Strategy, 2023, p.19.

⁴ The Perry Group, Corporate Information Technology Strategic Plan: 2020-2024, 2024.

https://app.oshawa.ca/agendas/corporate_services/2020/06-08/corp-20_17.pdf Accessed October 2024.

⁵ LURA Consulting, Oshawa Strategic Plan 2024-2027, 2024. https://www.oshawa.ca/en/city-hall/resources/Documents/Oshawa-Strategic-Plan_2024-2027_FINAL-web2.pdf Accessed October 2024.

⁶ The Perry Group, Corporate Information Technology Strategic Plan: 2020-2024, 2024

Benefits

feeling valued and satisfied. By providing staff with the skills, resources and support, they can be better prepared to serve customers. Citizens First found that when staff are perceived as going the extra mile, there is an increase in customer satisfaction.⁷ McKinsey & Company found that positive customer service outcomes boost staff morale and organizational health and are mutually reinforced by customer experience.⁸

Our Process to Develop the Strategy

The process of developing *Putting Customers First: Oshawa's Strategic Approach to Exceptional Service* included the consultations and reviews found in Figure 2 below:

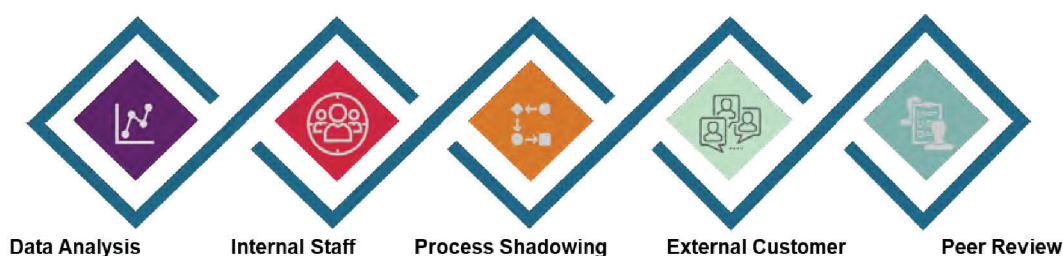


Figure 2: Process to develop Oshawa's customer service strategy.

The research identified six key outcomes that form the foundation for this strategy:

1. Establish clear customer service objectives and benchmarks to guide corporate performance.
2. Equip staff with advanced technology to enable a more complete 360° view of customer interactions.
3. Implement comprehensive training programs to maintain uniformity for the customer experience.
4. Integrate customer experience insights into the evaluation of operational procedures.
5. Guarantee timely and accurate information delivery to customers following service expectations and established standards.
6. Standardize reporting protocols for staff and members of Council to improve data accuracy and reliability.

⁷ The Institute for Citizen-Centred Service, Citizens First 2023: National Report: 2020-2024, p.6.

⁷ Ibid.

⁸ McKinsey & Company, The global case for customer experience in government, September 2019.

<https://www.mckinsey.com/industries/public-sector/our-insights/the-global-case-for-customer-experience-in-government>. Accessed October 2024.

Our Path Forward

Putting Customers First charts our path to a high-quality and consistent customer experience no matter who they connect with in the municipality. The vision and commitments provide a unified framework for customer-first service. The vision and commitments are supported by fourteen (14) actions and an implementation plan to guide our staff through this process. The strategy's implementation will ultimately demonstrate to our customers that we are responsive and committed to customer needs, adaptable to future challenges, and offer proactive support.

3. Our Customers

Our customers are at the heart of everything we do, including this strategy. Customers for the City of Oshawa include residents, businesses, investors, community organizations, strategic partners, service providers, members of Council, internal staff and visitors who rely on and interact with City services.

Demographic Trends

- **Growing population** - Oshawa is experiencing rapid growth. The population has a high percentage of working-age and retirement individuals, as shown in Figure 3. Since 2019, the population in Oshawa is estimated to have increased from approximately 175,000 to 196,500, resulting in a growth of 12.5% from 2019 to 2024. Over the next five years, the population is projected to grow by another 11.6%.

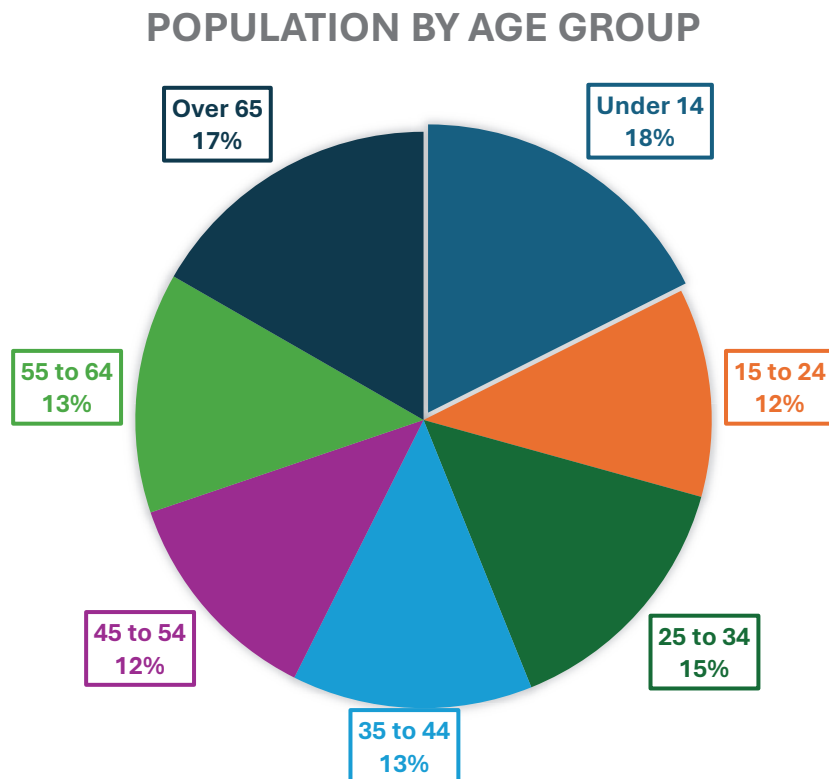


Figure 3: City of Oshawa population by age group, 2024.

- **Shifting age profile** - The Trends report suggests that "the population in 2021 is slightly younger at 39.2 years compared to 41.2 years in 2016. ...At the same time, the proportion of the population over the age of 55 years is increasing significantly, reflective of the general aging of the population."⁹

⁹ Alinea Community Development. 2023. Oshawa Community Trends: A review of the data, 2016 to 2021, p.11.

- **Increasing diversity** - The Trends report also suggests that "the population growth in the city is primarily driven by a growth in immigrant and racialized communities moving to the city. Over recent years, there has been an increase of forty-two percent (42.8%) in the immigrant population in Oshawa from 2016 to 2021".¹⁰

OFFICIAL LANGUAGES SPOKEN MOST AT HOME

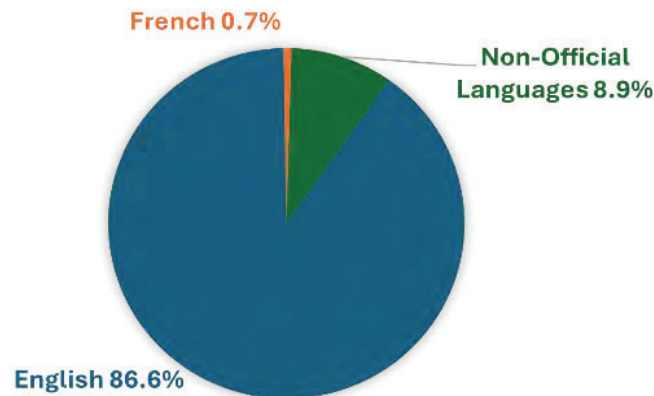


Figure 4: Official languages spoken most at home in Oshawa, 2024.

- **Language spoken** - While most residents speak English, as shown in Figure 4, the Trends report suggests a change in the languages spoken by Oshawa residents. "In 2021, 8.1% of the population indicated they spoke a language other than English or French in the home. This is a significant increase from 2016 when only 4.9% of the population primarily spoke a non-official language at home."¹¹

These changing demographics present an interesting challenge to ensure that the customer service needs of an aging population are met today while the needs of younger demographics, increasing diversity and language are met.

¹⁰ Ibid, p.5.

¹¹ Ibid, p.5.

Our Customers Needs and Perceptions of Service

Feedback from Oshawa residents, staff, and peer municipalities provided valuable insights for *Putting Customers First*. Through this research, we have learned that:

- Customers today expect more transparent, equitable, accessible, and responsive services from the public sector (Figure 5).¹²



Figure 5: Visual of customer needs.

- The phone had the highest volume of service requests, allowing customers to discuss their requests in detail and providing personable service. We need to continue offering phone service while increasing digital channel use and shifting service volume to customer-led service through Service Oshawa Online.
- Residents felt that the service channels were effective, convenient, and timely.
- Staff are perceived as knowledgeable, helpful and committed to resolving issues.
- There is a need to enhance the follow-up process, which is crucial for maintaining trust and satisfaction among residents.
- Further opportunities exist to understand the customer journey, from the customer's first touchpoint with the City until resolution. By understanding the customer journey, we can identify the most important journeys, map their experiences, and strengthen internal processes influencing satisfaction.¹³
- We can also enhance our efforts and ensure that residents feel heard and their concerns are addressed promptly.

¹² McKinsey & Company, Implementing a citizen-centric approach to delivering government services, 2015, p.3.

¹³ McKinsey & Company, Implementing a citizen-centric approach to delivering government services, 2015, p.5.

Why Customers Interact with the City

There are many reasons customers reach out to the City, as shown in Figure 6, and, as a result, there are many points of contact with City staff, the Mayor and Council.

Understanding the types of service interactions help to inform recommendations that reflect customer needs.



Figure 6: Types of customer interactions with the City of Oshawa.

We All Have A Role in Customer Service

When looking at Figure 7, Service Oshawa, frontline workers and diverse department staff all interact with customers, internally and externally, at some point. In addition, some requests come through members of Council. As a result, employees and elected officials have a role in creating and supporting exceptional customer experiences across the organization for both internal and external customers.

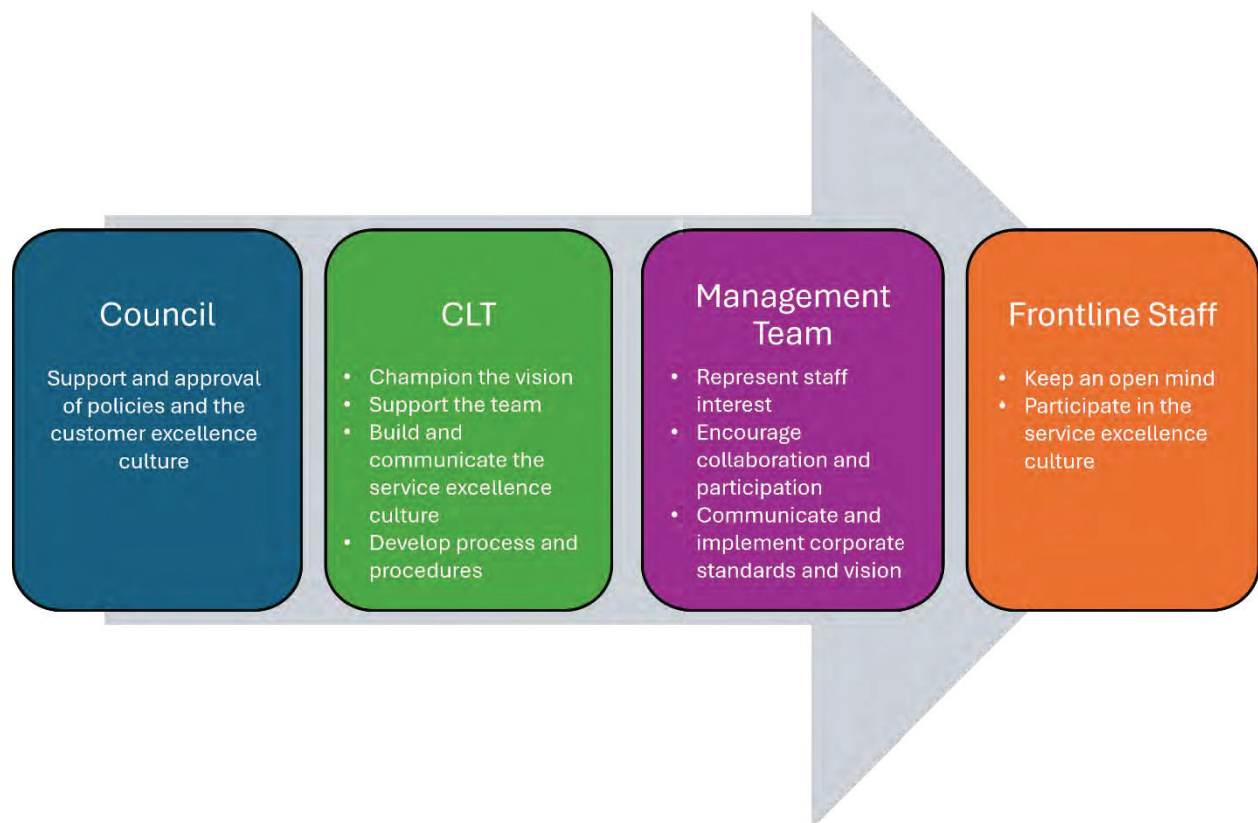


Figure 7: City of Oshawa roles in customer service delivery

4. Current State

To develop *Putting Customers First*, we reviewed our current approaches, trends and best practices from peer municipalities in Ontario. The findings are shared below.

A Snapshot of Our Current Customer Service Framework

Our customer service framework is consistent with many municipalities. Key steps in the framework work together to receive and resolve customer inquiries and requests, as shown in Figure 8.

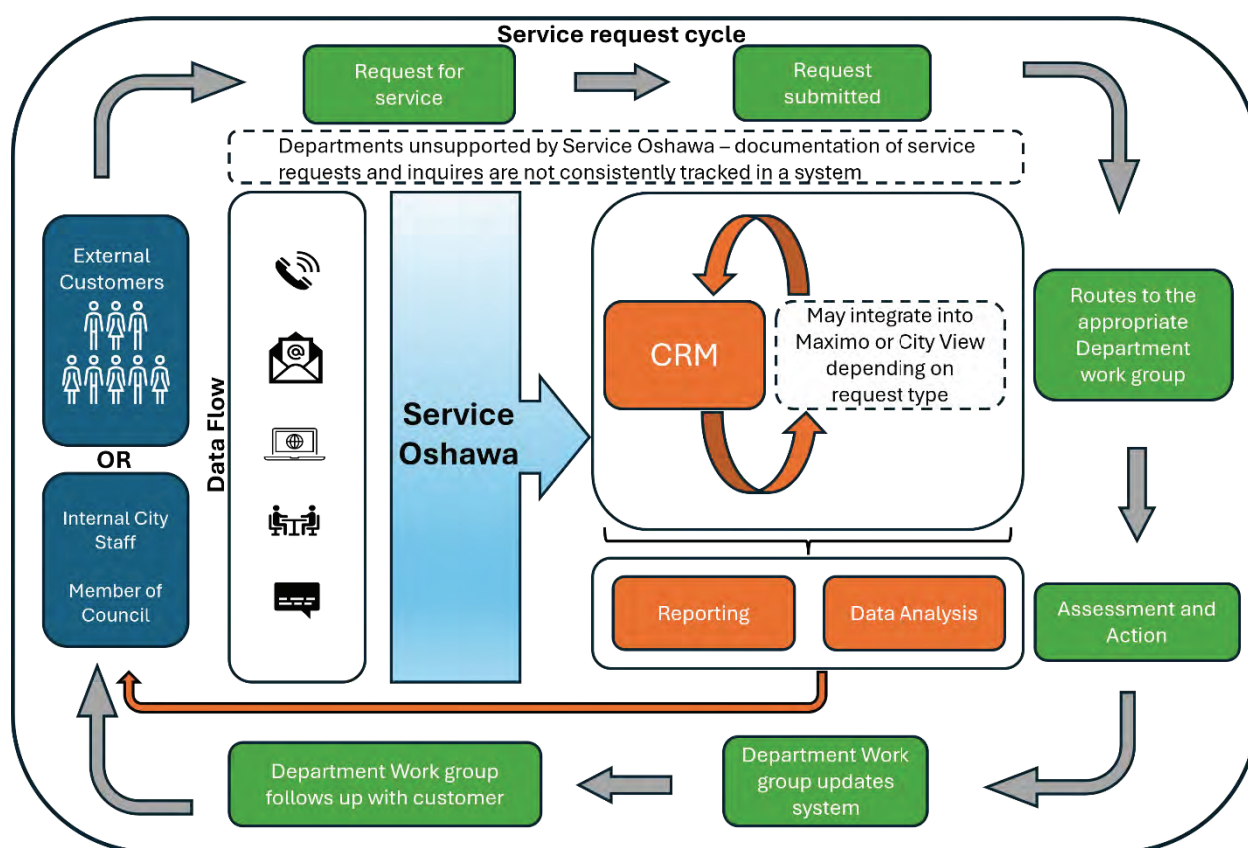


Figure 8: Customer service delivery model

1. Submitting a request or inquiry

Customers currently submit a request inquiry or access services across several channels within Service Oshawa (Figure 9):

By Phone

The phone remains the most popular channel for many customers, offering immediate and personal interaction.

By Email

Email communication provides a convenient avenue for customers to contact City staff and members of Council.

In-Person

The concept of centralized counter services, such as those provided by Service Oshawa, aims to streamline various services for better efficiency and customer experience. Customers can access in-person support from Service Oshawa at City Hall; there are customer-facing counters for more specific specialized services such as Recreation Services at each of the recreation facilities, Licensing and Standards, Building Services, Taxation and Revenue Services, Planning Services, Engineering Services and Mayor and Council office. Staff are available to assist customers regardless of location.

Online

We leverage technology to enhance civic engagement and streamline services. There are several systems integrated into the City's main website:

- The Service Oshawa Online portal and live chat to submit service requests,
- activeOshawa to register for various recreational activities and apply for the use of a recreation facility and
- The CityView online portal simplifies various permits and licensing applications.

These digital initiatives support our commitment to accessible and efficient services.

Dropbox

We offer a dropbox option at City Hall where residents and businesses can drop off items.

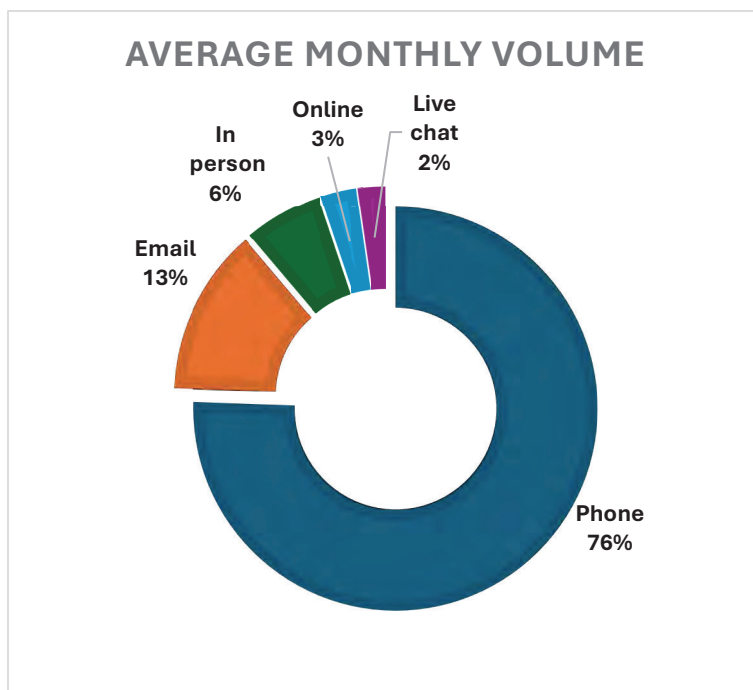


Figure 9: Percentage of monthly customer service volumes by type

2. Receiving, routing and tracking requests

Once a request or inquiry is submitted, several key systems support resolution and deliver a response to the customer:

Centralizing Interactions through Service Oshawa

Our centralized approach exemplifies a modern approach to municipal customer service. A dedicated service center called Service Oshawa is the first point of contact for many customers, whether by phone, email, online, or in person. Service Oshawa helps resolve customer inquiries and requests at the first point of contact. This model efficiently handles inquiries and requests, leveraging CRM software to streamline processes.

Service Oshawa is committed to delivering a consistent, and equitable experience for customers. Using CRM and knowledge systems, clear standards, and monthly quality monitoring ensures that staff can provide reliable information and service request handling.

Service Oshawa offers extended service hours of 8:00 a.m. to 6:00 p.m. Monday to Friday and 9:00 a.m. to 1:00 p.m. on Saturday, to cater to the community's needs. This flexibility reflects a commitment to accessibility and customer service, accommodating those unable to reach out during standard business hours.

Outside those hours, the after-hours voice prompt system and Corporate Security assistance further ensure that time sensitive services remain accessible and convenient at anytime. Examples of services accessible after hours are:

- Reporting parking, noise, and nuisance complaints. These calls are transferred to Corporate Security, which triage and send a request to an on-duty By-law Officer.
- Request a transfer to a Recreation facility.
- Reporting an issue that may be urgent (stop sign down, found animal road hazard, etc.) is transferred to Corporate Security, which references an emergency call-out document on how to deal with various urgent situations.

Interactions through Other City Departments

Not all service requests or inquiries come through Service Oshawa. This occurs for a few different reasons:

- Not all branches have yet integrated into Service Oshawa. For example, more specialized areas like Planning Services, Infrastructure Services and Building Services have not been integrated into SO. Once systems have been upgraded there will be a move towards integration.
- Requests have circumvented the typical process flow. For example, service requests from Councillors directly to a department may bypass SO.

- Customers may contact staff directly if they need assistance and perhaps have dealt with them for a past issue.

Reporting of Customer Inquiries

A key enhancement to customer experience is to find ways to direct inquiries to Service Oshawa, ensuring efficient and consistent customer service and data collection. Service Oshawa centralizes the information gathering, allowing for a more organized approach to addressing customers' concerns.

Customer Relationship Management (CRM)

A customer relationship management system (CRM) helps us manage customer interactions more effectively. The CRM centralizes contact information, service requests, and communication history. This system allows City staff to respond to inquiries or requests more efficiently. It helps to streamline workflows by automating processes, tracking service requests from submission to resolution, routing issues to the appropriate departments, and managing service levels for the various request types. We are currently updating our CRM system. The new CRM offers advanced features such as improved data integration, a more comprehensive view of customer interactions and behaviours, and better sharing of the knowledge system with other City staff and members of Council. The new system can integrate analytical tools like Power BI that provide deeper insights and more robust reporting capabilities, enabling data-driven decision-making. Such upgrades not only streamline processes but also foster better customer service and satisfaction, ensuring the City stays ahead in delivering exceptional service to Oshawa residents.

3. Assessing and action

Customer inquiries or requests are addressed by customer service representatives or routed to the appropriate staff. City staff assess the request, review the information, and determine the resources, priority, and estimated time needed to resolve the inquiry.

4. Responding and resolving requests or inquiries and following up

Once the service is completed, staff, when requested, will follow up with the customer to confirm satisfaction, close the request, and provide feedback on the outcome. At this point, the service request is closed.

5. Tracking and making data-informed decision-making

We can access a wide range of data and reports through various avenues and systems. This data assists with corporate decision-making, staffing, asset management and program requirements. Reporting is more effective when interactions are directed through Service Oshawa.

6. Reporting

Within the current CRM system, reports can be generated for the various branches for items such as request types and volumes, service level compliance, and request for information types and volumes.

Specific to Service Oshawa are various CRM and telephone systems reports to review monthly/daily interaction volumes and service level percentages (e.g. how many calls are answered within 30 seconds). Agent statistic reports look at average handle times, active talk time versus non-active time. These agent reports are part of the quality monitoring and coaching program the Customer Service Representative has monthly.

Challenges and Opportunities with Our Current System

The following highlights some challenges and opportunities to enhance customer service:

- **Phone:** High call volumes are a challenge, as responses depend on staff availability and the manual nature of service. Without computer telephony integration (CTI), which links the call centre's telephone system to the business applications, staff must manually enter data and identify customers, increasing their workload. As calls increase, there is more pressure to keep service levels up, highlighting the need for better technology to support staff and customers. Enhanced Interactive Voice Recognition (IVR) technology could be a significant step in modernizing telephone customer service delivery. Customer service representatives (CSRs) can allocate more time to complex cases when simple inquiries are streamlined through these automated systems, improving overall service efficiency.
- **Email:** Although convenient, email has challenges for service providers like Service Oshawa. Delays in responses can slow urgent issue resolutions like a stop sign down or stray animals. Due to the nature of some service request types, for example, a parking violation or sidewalk not cleared in winter cannot be accepted by email because the issue may no longer exist by the time staff are made aware, which is an inefficient use of staff time but also frustrating for the customer. Incomplete information often requires follow-up, which adds time. When emails are directed to or involve multiple staff members, there can be confusion and duplication, as it may be unclear who is responsible for addressing the concern. This can result in delays or a negative customer experience. Centralizing requests could make the process more efficient. Further integration of these systems could lead to a more cohesive and user-friendly experience.
- **In-person counter service:** Separate service counters with specialized branches can create inconsistent standards, variable service quality, and accessibility issues, causing delays. Addressing these challenges is crucial for ensuring consistent service delivery and maintaining customer satisfaction across all service counters.

- **Online:** Customers do not have a central point to access online services, but they have many points in our current decentralized or partially centralized model. For example, recreation registrations require an account with activeOshawa. In contrast, Service Oshawa Online requires a different account, as does the new CityView online portal. Similarly, there is a variance between accepted payment types by department. Customer complaint intake is not standardized. Service Oshawa and Recreation use online complaint forms for customer complaints/feedback. In contrast, Fire Services uses Lagan and Building Services and Taxation address complaints directly, as they typically come in by phone or email. Licensing directs residents to SO's online forms, while Animal Services logs complaints in their Chameleon system.
- **Data collection:** Current data collection is very disjointed, resulting in inefficiencies. Service Oshawa can generate reports on its activities (interactions, call volumes, counter transactions, etc.) for the branches it supports. These don't cover service requests or work orders from other systems. These are contained in other systems or, in some cases, no system. Investing in technology to integrate data would facilitate a complete view of issues. As technology and customer expectations evolve, there is a need to review and evolve data and Key Performance Indicators (KPIs).
- **Follow-up:** Customers and members of Council have expressed concerns about not receiving follow-up. Improving this requires implementing a robust training program and new CRM solutions to streamline the process and manage follow-up requests. These steps can increase customer satisfaction, reduce repeated requests or complaints, improve service efficiency and reliability, and foster trust in city services.
- **Integration and consistency:** The CRM is not fully integrated across all branches and systems. Addressing integration gaps is crucial for consistency in interaction management and data coherence throughout the corporation, ensuring that Oshawa can continue to deliver exceptional service to the community.

Extending the CRM, knowledge system, and other tools and programs across all branches would help eliminate service delivery inconsistencies. Expanding the reach of these tools and programs could significantly enhance the uniformity and tracking of customer interactions across all channels (phone, email, mail, online forms, and chat).

Summary of Key Areas for Enhancement

As observed in other municipalities, the centralized customer service model facilitates a unified approach to handling service requests. Oshawa's adoption of this model and the integration of specialized systems into the CRM demonstrates a forward-thinking strategy that prioritizes data accessibility and management. The potential for increased integration

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offers a promising avenue for providing a comprehensive view of customer interactions and property history, which can enhance personalized service and informed decision-making.

The positive feedback from consultation provides a strong foundation for these initiatives. However, the emergence of four key themes, as shown in Table 2, suggests an opportunity for refinement. Addressing these areas will be crucial for Oshawa to fully realize the benefits of technological advancements and continue serving customers effectively.

Table 2: Key areas for enhancement to customer service delivery in the City of Oshawa.

Theme	Description
 Oshawa delivers customer service via a centralized system that works well	- Through consultation, we heard that SO effectively responds to customer inquiries, answering questions they can and directing customers to operating departments when needed. - Issues can arise when customer requests are directly routed to Council members or staff. If requests aren't logged through SO, less data is captured, reducing data-driven decisions. - Service requests sent to branches for follow-up are sometimes closed without proper resolution or are not actioned. - After-hours emergency calls go to Corporate Security, which limits our ability to triage such calls.
 Closing the loop with a customer happens infrequently	- When a service request is created, the customer can receive follow-up communication once the request is completed. The CRM automatically passes this information to operations staff; however, follow-up is not consistently happening. - Information exists in multiple systems that are not always synchronized, creating situations where information is not available in the system staff have access to, so they cannot address the inquiry effectively.
 Customers rely on phone service	The phone is the most used channel. Phone service requires more staff time per request than other channels. Improved self-service capabilities will have limited results if most customer interactions continue via these manual channels.
 Current technology limits seamless service by the City	- The new CRM is a more modern system with several key features that enhance service. - The City does not currently have computer telephony integration (CTI) capability, making it harder to track phone-based customer interactions and less efficient for staff. - Single sign-on technology would help make online services more appealing. Creating multiple signups for different services frustrates customers, increasing calls or emails. - Investing in Power BI will allow the corporation to view data more fully, allowing for enhanced decision-making.

5. Vision and Commitments

Vision

Every interaction with the City is meaningful, efficient, and high quality. We strengthen community pride by delivering exceptional customer service.

Our Commitments

The commitments in Figure 10 form the foundation of our customer-first approach:



Figure 10: *Putting Customers First* commitments.

- **Foster a Customer-First Culture** - Our approach aspires to understand and meet customers' needs in every interaction, process, and service. By putting customers at the center of our work, we foster trust, responsiveness, and meaningful engagement, ensuring each customer is valued and supported. A strong customer service culture improves customer experience, enhances employee retention, and reinforces the City's reputation. All City staff and elected officials have a role in putting customers at the centre of service. Fostering a customer-centric culture requires a commitment from decision-makers to ensure the customer experience is reflected in the behaviours and values across the organization.

- **Deliver High-Quality, Consistent and Equitable Experience** - A high-quality and consistent experience is key to maintaining a strong reputation, especially when a single negative interaction can lead to frustration and dissatisfaction and decrease public trust. We aspire to achieve a seamless, consistent, high-quality experience at every touchpoint in a customer's journey that reflects our core values and identity.
- **Advance Technology and Share Knowledge** - We offer a variety of channels to customers, including phone, email, online, chat, and counter service. We are committed to optimizing channel management and enhancing knowledge sharing to ensure that the right services reach the right customers and knowledge is shared, fostering a culture of collaboration and continuous learning.
- **Drive Continuous Improvement** - We are committed to continuous improvement and regularly assess service performance, implementing data-driven changes that respond to the evolving needs of our community and setting new standards for exceptional service.

6. Priorities and Action Items

Putting Customers First: is supported by fourteen (14) action items. These action items are derived from assessing where our service delivery is today, customer and staff inputs, and reviewing best practices from peer municipalities. The strategies proposed reflect the City's unique position in our path towards creating exceptional customer experience.

People

We will empower and support our staff and Council to deliver exceptional service by fostering a customer-first culture, offering training, and ensuring they have the resources to address community needs effectively.

Action Items

1. Develop a change management plan.

Creating a customer-first culture across all aspects of customer service can be a shift from traditional, process-driven approaches to a more responsive, customer-centered focus. Providing a unified, high-quality experience across all customer experiences takes time and a thoughtful approach to managing organizational change.

One of the key aspirations of *Putting Customers First* is to entrench a corporate-wide culture with the customer at the centre of decisions. A fundamental toolkit for achieving this is Organizational Change Management. For change to be successful, we need to prepare and support staff and Council moving through the process so that they successfully adopt the changes. According to Prosci, organizations with excellent change management achieve greater success with change and are seven times more likely to

achieve project objectives, 4.6 times more likely to stay ahead or on schedule and 1.4 times more likely to stay on or under budget.¹⁴

Recommendation

Develop a Change Management Plan (CMP) to guide *Putting Customers First* strategies.



Change management is the processes, tools and techniques that manage, prepare and support staff in making, realizing, adopting and acknowledging change.

We recommend that the Prosci change management model be used as the framework for the change management plan as it is one of the most used in the world. This includes the Prosci 3-Phase Process for change at the organizational level (prepare the approach, manage change, and sustain outcomes) and the ADKAR (Awareness, Desire, Knowledge, Ability and Reinforcement) model. While *Putting Customers First* and the CMP create the approach for change, time and effort will be required to manage and sustain change over the long term to embed customer-first approaches into the corporate culture at all levels. The ADKAR model will set a framework for individuals in the corporation to transition through change (e.g., training, coaching, etc.).

This strategy includes the following activities:

- **Build awareness of the need for change:** A key first step is to ensure that staff know that a change in how customer service is delivered is coming.

Promoting this strategy is the first step to building that awareness. This process should be collaborative and encourage participation across the organization.
- **Create a desire to support the change:** To effect change, individuals need to be aware of the need to change and be willing to adopt changes in behaviours and practices. According to Prosci, managers need to engage and coach staff to connect to their motivators and find ways to reduce barriers at the individual level. Different groups respond to different benefits. For one group, having better tools might be key, while not having to complete a cumbersome process might benefit another. The CMP should focus on understanding the various interests and communicating the benefits to build desire among each group.

¹⁴ Prosci, Why Change Management? <https://www.prosci.com/change-management>. Accessed October 2024.

- **Build knowledge of how to change through training:** Applying new approaches takes training and practice. Some strategies address knowledge of how to change, such as training. Before jumping to training initiatives, it is important to ensure that staff have a clear understanding of and desire to create a customer-first culture.
 - **Gather staff insights:** A key step should be gathering and understanding the organization's training needs. As staff gain new or enhance existing customer service skills, there may still be a gap in implementing those skills.
 - **Develop a training portfolio and provide coaching and training** to support the transition from knowing what to do to applying those skills. This involves a strategic approach that aligns with organizational goals and industry demands. It's essential to tailor training programs to the specific needs of different roles, enhancing their effectiveness and relevance. A well-structured training portfolio boosts employee competencies and job satisfaction and fosters a culture of continuous learning and adaptability, which is crucial for long-term success.
- **Reinforce changes to make it stick:** Reinforcement explicitly considers repeating elements of the CMP to help ensure the change sticks. We should assess how well the change is taking hold, confirm a behaviour change, and recognize where the change has been successful.

Benefits

A change management plan ensures that changes are implemented smoothly across the City. The CMP helps foster consistency, supports employee engagement, and increases the likelihood of achieving long-term success.

2. Review staff roles and leverage technology to enhance capacity to support a customer-first approach

This strategy aims to change how individuals view customer service, have more customer-facing information and services, and build and expand services based on trends and needs. We want all staff to view customer service as one of the primary goals of their role. Achieving this level of customer service and all that comes with it can impact staff capacity. In some roles, the move to a more online service helps with capacity, whereas in other roles, moving more online increases the workload, for example, ensuring the accuracy of knowledge and needing to be proactive on emerging and ever-changing trends.

Reviewing staff roles and technology needs ensures employees have the resources and manageable workloads to deliver exceptional customer service. Ensuring we have appropriate technology enables streamlined processes, efficient communication, and data-driven insights that help to meet customer expectations effectively and consistently.

Recommendation

Assess corporate roles to prioritize customer service while balancing other responsibilities.

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A capacity assessment evaluates our ability to meet customer service demands. We can determine the impact on non-customer service work, influencing staffing levels, employee skills, workload distribution and the technology or infrastructure available to support customer service. We aim to ensure sufficient staff resources to provide exceptional customer service and experience across the organization. We can determine if the impact on staff's non-customer service work is acceptable or if additional capacity is needed.

This strategy includes the following activities:

- **Review current service demands:** The City has a strong dataset of customer interaction data from which to understand current demand.
- **Evaluate staffing levels:** As part of the Workforce Strategy, assessing whether current staffing levels are sufficient to meet demand, considering the volume and complexity of inquiries.
- **Assess employee workloads, skillsets and roles:** We should assess workloads, skillsets and roles across the organization to identify gaps that may impact service quality (e.g., knowledge or communication skills, non-customer service work demands). The assessment provides an opportunity to augment existing job descriptions to reflect the importance of customer service functions and the increased use of technology. Each role at the City should be reviewed, asking what this role needs to deliver against the customer service expectation and how that impacts non-customer service work. This is a significant undertaking, and we suggest each department assesses its role. This approach provides the capacity to do the review and an avenue to engage staff in the change management process. The process should be structured and coordinated by the *Putting Customers First* Steering Committee and have substantial involvement from Human Resources.
- **Identify technology requirements:** Part of the workloads and roles reviewed above can include discussing the current technology infrastructure and whether the tools meet customer service needs or if new technology or analysis could enhance efficiency and support a customer-first approach.
- **Review findings, identify gaps and make recommendations:** The review allows us to identify gaps and align responses. For example, if 10 staff members have similar roles, the evaluation impact should be the same for all roles. Based on the results of these assessments, we can determine where additional capacity is warranted.

All staff already deliver customer service at some point, and in some way, even when their role is not formalized. As such, we do not believe the impact will be very large. However, if material reductions in capacity are identified, it would be worth conducting an efficiency review to see if process or technology changes could mitigate capacity impacts.

Benefits

Addressing staff capacity concerns and technology needs may lead to greater support for the changes. This initiative builds a deeper and wider awareness and understanding of the City's customer service vision.

3. Empower and train staff

Customer service training is limited to a small number of roles today. This strategy makes customer service firmly part of everyone's role

Staff empowerment and training are key to organizational change and creating a customer-first culture. Training links to the third step of the ADKAR change management process: providing staff with the knowledge and skills to prioritize and effectively meet customer needs within a customer-first culture. Empowered staff have access to the tools and flexibility they need to meet customer needs.

Recommendation

Provide mandatory corporate-wide customer service training for all new staff and a refresher for existing staff across the organization to ensure they have the necessary skills, knowledge and tools for consistent, equitable, high-quality service delivery.

Each training program's form, format and content should be developed to focus on a specific set of roles that share the same customer service profile. For example, the expectations of Service Oshawa staff will be different than those of IT staff.

The training should address both external and internal customer service and ensure that training is ongoing and part of the onboarding process for new staff.

This strategy includes the following activities:

- **Gather staff insights to identify training needs:** A key step is gathering staff insights and understanding the organization's training needs (as noted in Strategy 1).
- **Assess employee workloads, skillsets and roles:** As noted in Strategy 2, we can assess the workloads, skillsets and roles across the organization to identify gaps that may impact service quality (e.g., knowledge or communication skills, non-customer service work demands). The assessment provides an opportunity to augment existing job descriptions to reflect the importance of customer service functions and the increased use of technology. The roles should be categorized according to the amount of customer service required and the size of the change to adopt this strategy. Two potential categories include:
 - Roles that serve internal customers and frontline external customers.
 - Frontline roles that serve external customers.
- **Develop a training plan and materials:** Based on the stakeholder analysis, we should develop training plans and materials specific to each role category. We

should determine whether we undertake this training effort directly or use the services of a customer service training organization.

As staff gain new or enhance existing customer service skills, there may still be a gap in implementation. Coaching and training can support the transition from knowing what to do to applying those skills.

In addition to a training plan to support the implementation of this strategy, the City would benefit from complementary plans that identify how new staff are onboarded and how existing staff have their skills and knowledge periodically refreshed.

- **Reinforce learnings and application:** As noted in Strategy 1, reinforcement explicitly considers repeating elements of the CMP to ensure the change sticks. We should assess how well the change takes hold and confirm behaviour change.
- **Recognize and celebrate success:** A key part of creating a corporate culture that embraces customer-first approaches is celebrating and recognizing innovation and excellence in customer service. We should consider formalizing a recognition for exceptional customer service.

Benefits

According to the Business Development Bank of Canada (BDC), staff training and engagement can motivate a team and increase productivity by up to 17%.¹⁵ Training provides staff with problem-solving and enhances communication skills, empowering staff to deliver consistent, equitable and high-quality service.

4. Strengthen customer service governance and follow-up.

As noted previously, customers expressed concerns about not receiving follow-up requests. Situations have occurred where requests are not addressed promptly or closed out without the request being completed satisfactorily. This can lead to escalations involving management, the Mayor, and the Councillors' office.

In addition, requests received through Council members do not always get managed within the regular workflow process, creating information gaps and inefficiency. Often, when a request falls outside the normal process, multiple staff and sometimes departments handle the same request, creating duplication and confusion. Often, these requests are not registered in the CRM software, so request tracking is limited.

Recommendation

Strengthen customer service governance processes to ensure all requests are promptly addressed and follow-up is completed.

¹⁵ BDC, Why training employees is good for your bottom line, <https://www.bdc.ca/en/articles-tools/employees/manage/why-training-employees-good-for-your-bottom-line>, Accessed November 2024.

This strategy includes the following activities:

- **Create customer service reports:** Management staff can access real-time customer service reports showing the aging of requests under their responsibility. Reports should show different levels of granularity higher up the organization. This process should establish controls so tickets cannot be closed without more senior approval and data updated in the CRM. Since multiple systems require requests, these reports should aggregate the requests to reduce the chance of disconnects.
- **Establish a process for capturing Council routed requests:** All staff should be informed on how they ensure that the information relating to a request from a member of Council on behalf of a customer is captured into the correct City system and is then managed alongside other requests to help create more complete information. Some municipalities have explored the role of Council members as partners to support customer service requests, and others have assigned a City staff person to act as Council members' point of contact for resident service requests who enters the request into the CRM to be routed, assessed, addressed and tracked.
- **Define controls for closing requests:** We can make status levels available to tickets, allowing staff to indicate that a request is completed and ready for review. Criteria could be defined based on the size or urgency of the request and which supervisor should review the request to confirm it is complete. This process would ideally employ workflow technologies to minimize staff time approving ticket closings.
- **Inform the customer of the outcome and receive feedback:** Methods exist to inform the customer and other interested parties of a request's outcome. The process of asking if the customer wishes to be notified remains valid. Integration within a customer portal in the CRM system would allow customers to know the status of their requests and outcomes. As part of the various technology upgrades, leverage the ability to allow customer feedback through various channels.

Benefits

By strengthening the governance and follow-up processes and controls, incidents should be reduced where requests are not addressed correctly or completely. This, in turn, reduces the effort of staff and Councillors involved in escalations today.

Processes

We will standardize our service processes to enhance efficiency, transparency, and consistency across all departments, ensuring that customers receive timely and reliable service at every touchpoint, while embedding equity and inclusion in our processes.

Action Items

5. Introduce customer journey mapping for all services offered.

A customer journey is “a person's entire experience when seeking a government service. The journey has a distinct beginning and end, and because it is typically multitouch and multichannel, it is also cross-functional. A customer journey is anchored in how people think about their experience, not how government agencies do.”¹⁶ A customer journey map (CJM) can highlight key touchpoints and interactions, helping governments understand the customer's perspective, anticipate needs, and identify areas for improvement.¹⁷

In the past, customer satisfaction was primarily measured through response times in customer service standards. The existing service standards at Service Oshawa specify that phone inquiries must be answered within 30 seconds, 70% of the time. More contemporary thinking suggests that standards should relate to the customer's experience through the whole interaction, not just metrics that relate to the organization's responsiveness.

As an organization, we have implemented many continuous improvement projects, reduced process times, and improved efficiency for many services. These projects streamline services from a staffing perspective, improving the customer experience. However, with CJM, we can fully design the customer experience across all channels, interactions and departments.

Recommendation

Prepare customer journey maps for the services most important to most residents and create the journey working from the most used services to the least to inform customer service standards across all channels.

This strategy includes the following activities:

- **Define the journey map's objectives:** Build on this strategy's commitments to fully describe the future customer experience and aspects of the customer experience we want to improve.

¹⁶ McKinsey & Company, Implementing a citizen-centric approach to delivering government services, 2015. p.5.

¹⁷ US Department of Agriculture, The Power of Journey Mapping: Enhancing Customer Experience <https://www.usda.gov/media/blog/2024/11/12/power-journey-mapping-enhancing-customer-experience> Accessed November 2024.

- **Develop customer personas:** Developing customer personas to represent typical users of municipal services needs to be mindful of who the customer is and that there is no one-size-fits-all. Each persona would consider demographics, pain points, motivations, and expectations. Understanding personas helps ensure the journey map reflects the local community's needs.
- **Map how customers experience the journey:** Customer journey mapping (CJM) captures customers' experience from their point of view. This tool allows an organization to focus on the aspects of the current experience that are not meeting the defined customer service commitments. By breaking down the journey into each step and interaction that a customer experiences with the City, from initial contact to issue resolution, we can identify opportunities for improvement across the experience. Some journeys have more steps and staff involvement than originally anticipated, and each person's journey may differ. This step includes identifying all the touchpoints and channels where customers interact with the City.
- **Review the internal processes related to the journey:** Documenting the key activities, actions and systems involved in each journey stage provides an opportunity to identify pain points and areas for improvement.
- **Identify opportunities for improvement:** Using the CJMs, we can highlight where the current experience differs from the desired experience. We can develop strategies to address pain points, improve satisfaction, or streamline the journey.
- **Manage contact points:** Typically, the times the customer interacts with City staff define the experience. These should be overseen when operationalized. For example, closing cases – no case should be closed unless a person with supervisory responsibilities reviews it to confirm it is complete and that the customer has been communicated the resolution.

Benefits

According to Forbes Advisor, a customer journey map helps government agencies understand the customer's experience, identify pain points, and make better decisions to be more responsive and user-friendly.¹⁸ This tool allows municipalities to enhance service delivery, reduce inefficiencies, and build trust and satisfaction.

6. Develop a plan for better access to services outside of regular business hours.

Service Oshawa is available Monday to Friday from 8 a.m. to 6 p.m. and Saturday from 9 a.m. to 1 p.m. Outside of these hours, calls are answered by Corporate Security, which receives inquiries on various issues, such as parking enforcement, noise and nuisance issues and any health and safety-related issues requiring immediate attention. Corporate

¹⁸ Miranda, D. and R. Watts, Customer Journey Map: Everything You Need To Know (2024), <https://www.forbes.com/advisor/business/software/customer-journey-map/>. Accessed October 2024.

Security is not always equipped to respond. In an emergency, Corporate Security will forward the details to the on-call By-law Officer or Operations staff to handle.

Recommendation

Identify ways to facilitate service access after-hours.

This strategy includes the following activities:

- **Identify the demand for after-hours services:** Review data on customer inquiries, requests, and interactions to determine which services are in the most demand after hours. Some municipalities offer extended service hours, such as the City of Mississauga, where customer service is offered from 7:00 a.m. to 7:00 p.m., and Facilities provide services until at least 9:00 p.m. Some offer 24/7 phone service, however in some cases this is offered because they are mandated to have staff monitoring alarms 24/7 for service types that Oshawa does not have.
- Identify the most appropriate combination of techniques for delivering service around customer needs:
 - **Train existing staff:** We can consider training staff who work outside Service Oshawa core hours to address service requests. Through this strategy and the Change Management Plan, the responsibility for customer service has been expanded across the organization. Therefore, any staff working outside Service Oshawa hours and handling customer service responsibilities could fulfil this role. (see Strategy 1).
 - **Acquire an out-of-hours answering service:** Some peers rely on third-party after-hours services to ensure their customers receive timely and efficient support, even outside regular business hours. The out-of-hours answering service triage calls to determine whether they can wait to be addressed in the morning and route accordingly.
 - **Configure the call system:** The current telephony system is currently outdated and does not have the flexibility that newer systems do. The current system allows Service Oshawa to design call routing and schedules so that calls coming through general numbers can be routed to different recipients at different times. The current system requires multiple steps, while more modern systems have greater integration efficiencies, resulting in fewer delays. By confirming a new call system (see Strategy 13), there are opportunities to extend some service inquiry capacity beyond SO hours.
- In an ideal scenario, during SO hours, a call would go to them, prior and after hours would go to the extended hours' customer service staff, and finally, outside hours would go to the third party.
 - **Use other channels:** Various channels support providing customer service when staff are not available, including:

- **Online self-serve options:** According to Citizen First 2023, COVID-19 greatly accelerated the shift toward greater online use, and the changes appear to be here to stay. It is the preferred source of government services for most of our citizens.¹⁹ Opportunities exist to expand or enhance online self-service options (Strategy 14).
- **In-person options:** Kiosks could be at facilities for customers to complete transactions when counter staff are unavailable (Strategy 8).
- **Online:** We can also consider using AI and chatbots to address inquiries. Several other municipalities intend to implement or enhance chatbots to assist in customer service strategies.²⁰

Benefits

Offering alternative approaches to extend service hours provides customers with multichannel access and consistent customer experiences and ensures that Corporate Security can focus on its security role.

7. Update corporate-wide customer experience standards and develop guidelines and policies for all customer interactions.

Once the customer experience has been designed, a key implementation tool is to set standards, guidelines, and policies for City staff and Council.

Customer service standards establish how City services should be delivered to meet customer's needs effectively, equitably, and consistently across all channels and departments. Current customer service standards need to be updated to reflect current trends. Although the current standards are corporate-wide, they are being used inconsistently. For example, new employees are not trained as customer service champions. When someone reports issues, how they are managed can be inconsistent depending on how and where the request was reported. For example, Service Oshawa reports on and reviews interactions with their staff to ensure consistency; however, departments outside of Service Oshawa may or may not maintain their own at various levels of formality.

Although service levels for the completion of various requests may differ depending on the nature of work, there needs to be consistency in what and when information is relayed to the customer, whether internal or external. For example, a forestry request to remove a tree

¹⁹ The Institute for Citizen-Centred Service, Citizens First 2023: National Report: 2020-2024, p.6.

²⁰ MNP, Transforming service delivery across Canadian municipalities, 2024 MNP Report, <https://www.mnp.ca/en/-/media/files/mnp/pdf/service/digital/mnp-2024-canadian-municipality-digital-transformation-report.pdf>, p.12.

may take longer than a report of a pothole. However, the person reporting the issues should have their request acknowledged, updated on progress and updated once completed.

Reviewing and updating the customer service standards and creating guidelines and policies assist both staff and Council in providing exceptional, coordinated, equitable and unified customer service.

Recommendation

Develop customer service standards, guidelines and policies for exceptional customer service for all customer relationships (i.e. internal and external) across all channels.

This strategy includes the following key activities:

- **Review current and identify new levels of service:** A first step to developing customer service standards that work across the organization is to review what is working currently, what levels of service are being achieved, where gaps exist, and appropriate levels of service to meet customer needs. This review builds on this process's internal and external consultations and helps the organization understand where improvements are needed. This assessment identifies common issues, customer complaints, and inefficiencies, informing realistic and appropriate standards across channels.
- **Identify customer service performance metrics:** For each aspect of the customer experience, we can review and develop metrics to measure how well we achieve the experience across customer interactions and develop a quality assurance program across the organization to ensure we are meeting those targets. For example, if one of the aspects of customer experience was the first point of contact resolution, we could measure the number of contacts referred to someone else in the City after the first point of contact or when a service request has been submitted we would monitor whether the customer is receiving appropriate follow up and case resolution is occurring within service level.

Modern customer satisfaction metrics look beyond these process measures and focus on the key features of the customer experience, which might include responsiveness, going above and beyond, being friendly and minimizing the customers' time, feeling valued, among others.

- **Gather internal data and input from staff, corporate leadership and customers:** Likely, some of the data already exists in City systems, but since we are measuring experience, not process, it is also very likely that additional data needs to be gathered. We should define the methods by which we gather the additional data.

Since we are discussing experience, customers are a source for some of this information. We can bring together departments with customer-facing staff to

define appropriate customer service standards and supporting guidelines and policies.

- **Prepare customer service standards, guidelines and policies** that are delivered across the organization to increase both consistency and equity.
- **Prepare reports:** As with any measures, we should monitor performance. Strategies 4 and 8 also reference creating reports to monitor performance, and customer experience standards should be integrated into those reports.

Benefits

Ensuring clear standards, guidelines and policies for staff and Council on what, when and how issues are reported supports consistent customer service delivery and strengthens transparency and accountability.

8. Enhance in-person counter services.

While we have made progress in creating Service Oshawa as a consolidated touchpoint for customers, there are still opportunities to centralize customer service further to make it easy for customers to access various services at one time and in one location.

There is an opportunity to re-imagine and pilot a centralized service model that brings more services to the front door of City Hall. A similar City Hall model has been applied in the City of Kitchener, which brings eight services to a centralized counter, creating an easy-to-find customer-centric solution. The counter dedicates several fixed service spots to revenue, payment-related, and legislative services. The remaining spots are available for subject matter experts from planning, buildings, transportation, engineering, customer service, and others) to engage with customers. Space is also designed to accommodate accessibility. Subject matter experts have a shared workspace behind the counter, enabling any service to be 'called up' to the counter to support a customer. Departments are responsible for staffing the SME stations. Small conference rooms are available for conversations that require privacy. Customer service representatives are at the counter to address common inquiries, and a general information station is also available. The counter is supported by a service call centre that provides first contact for phone inquiries.

There are opportunities to empower more staff to address customer needs at remote locations across the city. Customer service hubs create a streamlined 'one-stop-shop' service as customers' first point of contact. By developing customer service standards, guidelines, and policies across all departments, satellite locations can support consistent experience and provide the same range of services to the greatest extent possible. This ensures the customer experience is consistent regardless of the counter they attend.

Recommendation

Conduct a feasibility study to assess enhanced centralized in-person counter service at City Hall and centralized service counters at satellite locations.

This strategy includes the following activities:

- **Identify the services and potential locations for centralized service:** This step identifies the locations and types of services available at general service counters, peak service times and how they are staffed.
- **Engage staff:** It is critical to engage department staff and leadership at each step as part of the change management process. Staff engagement is important to ensure technology and space requirements are considered in the design, and there are mechanisms for frontline staff to raise issues during the feasibility study and share mitigation ideas.
- **Identify technology needs and integration:** When services are identified for centralized counters, it is important to ensure staff at counters access the same information and technology, including CRM access.
- **Secure space at City Hall:** Creating space on the main floor of City Hall ensures all in-person services are available to the public. Allowing a customer to receive multiple services without leaving the main floor. Staff from all areas are always available to assist during regular business hours.
- **Design space at City Hall:** The design should consider the size of space required for the services available. This includes the space needed to provide workstations close to the counter and design elements relating to washrooms, common spaces, private workspaces, noise mitigation and other staff space needs identified through consultation. Space design should consider specialized counter (i.e. Building Service and Planning) priorities and accessibility needs.
- **Integrate a kiosk(s):** Identify services offered through a kiosk in all City facilities where customers can report, apply and pay for various services.
- **Confirm location(s) to pilot centralized service:** Once all feasibility study parameters are confirmed, secure the location and consider wayfinding to support customers' orientation to the service counters.
- **Create guidelines and policies:** As identified in Strategy 7, customer-first service standards, guidelines, and policies are important in ensuring that customers are the priority for all services.
- **Provide customer service training:** As identified in Strategy 1, it is critical to ensure that the staff at generalized or centralized customer service counters have the skills and knowledge needed to ensure that a customer attending any in-person counter receives the same experience.
- **Identify staffing needs and assign a greeter:** There is a need to identify staffing requirements for the satellite hub(s) and an opportunity to create a greeter at the main entrance doors to help direct and visitors to City Hall.
- **Manage people:** We should consider investing in a system to manage in-person traffic at City Hall, allowing online appointment booking and visitors to plan or walk in to receive needed services.

- **Monitor and report on findings:** We should track performance metrics, customer satisfaction and employee feedback to gauge the effectiveness of the feasibility study. Compare these metrics with pre-implementation baselines to assess improvement and make necessary adjustments.

Benefits

Enhanced counter service increases customer convenience.

9. Support data-driven decision-making to respond to customer trends and demands.

Currently, there are limitations to providing detailed specific reports to Council. Ward-based reports only show service request counts per ward, and it is hard to compare across wards without manual work. Service Oshawa reports monthly service level metrics by manually extracting data from various sources and consolidating them in Excel. There is also no real-time reporting (dashboards) to see trends as they happen, which would help departments respond proactively and improve communication with customers. Better use of service and information data could help identify which services generate large volumes of questions and concerns, assess if they are one-time or ongoing, and guide service improvements, supporting continuous improvement.

Recommendation

Enhance data-based decision-making by implementing a data warehouse and establishing analytics that identifies changes we should make to continue to meet customer needs.

Data analysis capabilities can be improved by implementing a data warehouse that aggregates customer data from various systems. This tool elevates reporting, advances data integration and facilitates a more cohesive understanding of performance.

Formalizing how data is interpreted and changes supports data-driven decision-making. Typically, this starts with defining a set of key performance indicators (KPI) and target performance levels to provide a fulsome picture of performance and provide decision-makers with accurate information.

This strategy includes the following activities:

- **Create a data warehouse and analytics:** Identify and document relevant customer data sources and develop a data model that allows us to report against KPIs easily. Establish methods by which that data can be extracted and loaded into the warehouse on a defined frequency.
- **Develop dashboards or other reporting tools:** We can develop dashboards and reports to share information with managers across the organization and Council. This step also involves defining the methods by which performance is discussed and decisions made on customer service.

- **Monitor customer trends and behaviours:** We can also monitor trends and behaviours. These are not necessarily KPIs but reflect what customers are doing or choosing. The insights gained from the trends should stimulate conversations about how we respond to the changing environment.

Benefits

Better data allows for more informed decision-making. Data analysis further optimizes resources and provides information needed to address issues promptly based on evidence. Reporting also provides an avenue for increased transparency and the ability to track emerging trends.

10. Connect with Durham 311

Durham Region offers a 311 service as its primary contact for residents to access all non-emergency information and regional-related service requests, including issue reporting, issue status checks and other related inquiries. Where Oshawa delivers a similar service, the call is transferred to the City of Oshawa to be addressed by City staff.

Recommendation

Continue identifying opportunities to provide a seamless customer experience with connections to and from Durham 311.

As we develop customer service experience, we should collaborate with the Region to ensure we align our approaches and connect our processes where appropriate to do so. Adopting new telephony and upgrading the City's CRM should allow us to implement streamlined methods for enabling these transfers. It should consider the objective of making it invisible to the customer that a transfer occurred.

This strategy of driving a customer service culture within the organization does not suggest creating a more integrated relationship with Durham 311 at this time.

The strategy focuses on staff – who always have customer service responsibilities - and systems in Oshawa. Once the customer service commitments of customer excellence, consistency, knowledge and continuous improvement have been achieved, we can reconsider the level of integration with Durham 311.

Overall, City and Region staff should explore how best to maintain connection and alignment whenever we change systems or processes relating to customer service.

Benefits

By continuing to identify opportunities for seamless customer service between Oshawa and Region, customers who use Durham 311 get a similar level of service as if they had approached Oshawa directly.

Technology

We will leverage technology to improve accessibility, convenience, and responsiveness in our customer service offerings, enabling customers to interact with city services seamlessly through multiple channels.

Action Items

11. Develop a technology roadmap for continuous improvements.

Technology plays an important role in municipal customer service and is continuously evolving rapidly. Technological tools are used to streamline internal and external processes, improve response times, and enhance customer accessibility. Today's tools include computer telephony integration (CTI), CRM systems, online web interfaces, self-service portals, chatbots, online chat with person, and mobile apps. National research findings highlight that online services are here to stay, and there is an appetite for improved municipal online services. Oshawa still has a significant volume of customer service by phone. Our strategy considers both continued support for exceptional phone service to meet the needs of current customers and expanded digital offerings to be future-ready.

Backend technology tools are evolving and creating seamless interactions and resolutions. We are currently updating our CRM to support greater functionality and allow customer to upload photographs related to their complaint.

The City's Information Technology Strategic Plan aims to move towards digital service as a preferred channel and digitize end-to-end business services. Creating a technology roadmap specific to customer service ensures we stay current on the latest technology and technology-enabled services and prepare for future investments.

For example, automated chat functions are becoming increasingly common and will soon be augmented with AI. When this understanding is not integrated into IT purchase decisions today, it can be much harder to onboard these technologies due to environmental limitations.

Recommendation

Prepare and maintain a customer services technology innovation roadmap that identifies beneficial technologies and timelines for adoption.

The technology innovation roadmap should identify the most beneficial technologies, when to adopt them, and what to avoid that could make adoption more challenging.

According to the BDC, "Investments that only address immediate needs result in fewer benefits, duplication of effort and higher costs."²¹ It is important to focus on a longer time horizon and consider what the municipality needs to stay competitive. BDC suggests flexible, scalable, and expandable technology that accommodates long-term needs and maximizes gains from investment.

This roadmap should be integrated with the IT Strategic Plan and the GIS and Data Strategy.

This strategy includes the following activities:

- **Identify emerging technology needs:** The first step is to continue to review and evaluate business processes, identify inefficiencies, identify technology gaps, and identify the functional capabilities we need to improve customer service.
- **Plan and monitor trends and innovation:** We should continue to research the common, current, and emerging technologies in customer service, considering how the City would benefit from their application. We should also gather insights into challenges, lessons learned, and enhancements to inform decision-making.
- **Identify timelines and investment needs:** The roadmap should identify when to implement technology at the earliest opportunity while considering the investment needs and competing priorities.
- **Maintain and refresh:** Given the rapid evolution of technology, we recommended that the roadmap be updated annually to reflect timing and new technologies.

Benefits

Appropriate technology allows us to manage inquiries more efficiently, offer 24/7 access to information, and personalize interactions based on customer needs. Technology also enables data collection and analysis, helping us understand preferences, identify service gaps, and make data-driven improvements. A technology innovation roadmap makes it more likely that we adopt the technologies, help reduce the total cost and decrease the likelihood of redundancies.

12. Expand and promote digital service options and reporting.

Despite having a wide range of digital service options, our analysis indicates that most customer contact is via phone, which is labour-intensive compared to the alternatives. In addition, the customer survey showed less positive feedback with online channels than other channels. Service Oshawa Online and online chat have lower customer service volumes than customers' preferences. This reinforces the idea that the City has an opportunity to increase the use of digital channels.

²¹ Pastrikos, J. 6 steps to creating your technology roadmap. <https://www.bdc.ca/en/articles-tools/blog/it-strategy-6-steps-creating-your-technology-roadmap> Accessed November 2024.

According to the Citizen First 2023 Report, other municipalities are seeing an increase in online services, with 44% of customers using online services as their main service channel, a slight increase from previous years.²² Similarly, research by MNP suggests that municipalities expect to "implement or improve digital services such as chatbots, online chat services with live agents, SMS messaging, service portals, and mobile applications" as key digitization tools.²³ Anticipating that Oshawa will follow a similar trend, there is an opportunity to enhance digital service options proactively.

We will continue to align with the Information Technology Strategic Plan goal to move towards digital service as a preferred channel and digitize end-to-end business services.

Recommendation

Expand and promote digital service options, focusing on increasing online engagement with Service Oshawa.

This strategy includes the following activities:

- **Identify user pain points:** As identified in Strategy 5, we can gather feedback from external and internal customers to understand their experiences with self-service. This can include reviewing Oshawa's website in general and looking for improvements to the ease of navigation, accessibility and language support.
- **Identify potential services not currently online:** Review services to identify other opportunities for automation with an online service and any changes to processes to provide the service online.
- **Enhance the digital service options:** Trends point to the higher usage of chatbots, AI, and online chats as viable alternatives to in-person or phone services. Investigate the potential of having an Oshawa App to register, report and apply for various services. These technologies offer the potential to enhance customer experience by providing quick, efficient, and accessible support. As part of our commitment to continuous improvement, we recognize the importance of staying at the forefront of technological advancements. Therefore, we will assess these technologies and consider piloting low-cost solutions to provide new and exciting avenues for customers to interact with the City. By embracing these innovations, we aim to streamline services, reduce wait times, and ensure that customers can upload required documentation and access the information and assistance they need, anytime and anywhere.
- **Determine cyber security and data privacy needs:** As with any online interactions, we must consider the cyber security needs to protect personal information. Cyber

²² The Institute for Citizen-Centred Service, Citizens First 2023: National Report: 2020-2024, p.9.

²³ MNP, Transforming service delivery across Canadian municipalities, 2024 MNP Report, <https://www.mnp.ca/en/-/media/files/mnp/pdf/service/digital/mnp-2024-canadian-municipality-digital-transformation-report.pdf>, p.12.

security and privacy are priorities for comparator municipalities. Protecting data is essential to maintain trust and function efficiently in the digital age.²⁴

- **Create a marketing campaign:** As we upgrade our digital service channels, we can begin marketing to customers. The campaign should focus on improving customer awareness of digital service options. This should also include reviewing and updating our tutorial content for using self-service features.
- **Implement digital service enhancements.**

Benefits

Digital service options benefit customers as they are more convenient, have 24/7 availability and support, and enhance "feedback loops" as digital service is easier to track. Suppose service volumes shift from the phone to Service Oshawa Online, in that case, we will be more likely to meet service targets without increasing the number of Customer Service Representatives. We can create a more cost-effective service by promoting digital services to customers.

13. Update the corporation's telephony system.

Computer telephony integration (CTI) links telephones and computers to work together seamlessly. The municipality uses CTI to streamline customer service workflows, personalize customer interactions and increase overall productivity. Our current telephony system is reaching end-of-life and does not offer modern features that support enhanced customer service activities.

Recommendation

Upgrade the current telephony system to a modern platform that offers better customer service support.

In addition to standard features, we could consider:

- CRM integration
- Post-call survey
- Automatic call distribution
- Call analytics
- Adaptable introductory messages
- Softphone
- Customer wait time notifications/call-back functionality

²⁴ Ibid, p.10.

This strategy includes the following key activities:

- **Gather insights into systems and features in the marketplace:** We can review common systems to understand the newer features that might benefit in addition to a standard platform.
- **Define phone system requirements:** Following the review of products and features, we can gather the requirements for the new phone system. For example, key features should be the ability to easily change upfront messaging, allowing customers with queue wait times and staff to seamlessly access the phone queue from anywhere with simply a City computer and wi-fi connection.
- **Procure a system and implement:** The final stage launches a procurement process to identify a vendor and platform that best fits the City's needs.

Benefits

According to Forbes, modern call center automation using telephony integration software benefits the organization by implementing standardized call-handling processes, reducing call center costs, handling routine tasks efficiently, optimizing productivity and ultimately enhancing customer experience and satisfaction.²⁵

14. Advance a self-serve portal.

Strategy 12 discusses enhancing and promoting digital service options. Customers do not have a central point to access online services, but they have many points in our current decentralized or partially centralized model. All departments can create customized online forms, ensuring customer feedback is available for customer service representatives (CSR). Most departments rely on the SO-specific form and do not customize their own.

The City is in the early stages of introducing a single sign-on option for our online portal, as we upgrade some of our aging platforms there is opportunity to better connect the services through potential integrations or at the very least making the transition from one platform to another more seamless to better the customer experience. Whether you're paying a bill or signing up for a recreation program, you could log in once to access all platforms effortlessly. Our CRM will continue to contain much of the information on requests and inquiries and CityView will continue to provide access to various applications and permits.

Recommendation

Implement a customer portal to serve as the single access point to various City digital platforms with the use of a Single Sign-on technology.

Along with the ability to complete transactions with the City, the portal should be a place to track the status of transactions, including potentially notifying the customer when a

²⁵ Shewrta and K. Main, What Is Computer Telephony Integration (CTI)?, <https://www.forbes.com/advisor/business/computer-telephony-integration/>, Accessed November 2024.

request is updated or closed. This strategy supports a consistent customer experience across channels and complements several other strategies, including advancing the CRM and accessing services outside regular hours for phone and other channels.

This strategy includes the following activities:

- **Review existing digital platforms, databases, and systems:** The first step is to review the systems and platforms we want to connect to a portal, including customer-facing systems like Service Oshawa Online, ActiveOshawa, CityView and TXM (Property Tax System). We should identify what can be integrated (e.g., CRM systems and payment) and determine if the systems are compatible to ensure a unified experience where possible. This step requires consultation and discussion with City staff who engage with each platform, IT, and the Corporate Leadership Team to ensure the integration meets the best corporate objectives and community needs.
- **Consider the user interface and experience:** Several questions need to be answered, but thought about simplistically, we need to decide how it will give users access to each service – will it be through a capability in the portal itself, or will the user be passed to another City system? For example, in the case of recreation, we have an existing recreation platform, and the best course of action is likely to transfer the user to that platform to complete their recreational activities. Ultimately, the goal is to create a user-friendly, intuitive interface with straightforward navigation. The user interface must meet web accessibility standards and function across devices. A second design question is how to provide the users with an aggregate view of their interactions with the City and how to keep this up to date. Particularly since much of the information resides in operational systems, will some of this information be replicated within the portal platform for users to monitor? Finally, notifications – how will we communicate with customers, and how automated should this process be?
- **Develop a new or existing portal platform:** Once the capabilities and user interface needs are determined, we can determine if an existing platform can be used or a new one that integrates across all existing systems and protects security personal data. Consider whether an off-the-shelf solution or custom development better fits our needs, factoring in time, budget, and technical requirements.
- **Determine cyber security and data privacy needs:** As with any online interactions, we must consider the cyber security needs to protect personal information. Cyber security and privacy are priorities for comparator municipalities.
- **Test, launch, and promote the portal:** Launching a customer portal should be closely coordinated with the new customer service platform and promoting online services. We should set targets for how many customers it wants to register over time. If we want online self-service to become the preferred channel, using

something like taxes as an example, where most residents interact with the City, can be an effective tool to drive registrations.

As we create the unified platform, we can begin marketing efforts to customers. City staff and members of Council have a role to play in promoting the use of digital services to ensure that inquiries and requests are logged, processed, and responded to effectively and efficiently.

- **Monitor, maintain and refresh:** By integrating with other systems, we can track usage, response times, and user feedback to evaluate the portal's effectiveness and create a seamless one-stop source for government services. Feedback can fix any issues and improve the portal over time.

Benefits

Improving self-service provides customers instant access to the services they want when and where it's convenient for them. Improving self-service allows us to enhance customer service, extend hours and close the loop with customers without necessarily expanding customer service staffing. Providing a portal using Single Sign-On technology provide further benefits, such as;

Convenience – No need to remember multiple usernames and passwords.

Efficiency – Faster access to services without repeated logins.

Enhanced Security – Reduced risk of password fatigue and phishing attacks.

Improved User Experience - Streamlined access to all services in one place.

7. Implementation

The following provides an overview of how to transition *Putting Customers First* from planning to implementation. A strong focus on implementation, coordination, and measurement is essential to the plan's success.

Putting Customers First identifies the activities and the time staff are involved. For successful execution, we may need to allocate additional resources such as training for staff, communication tools, etc., to ensure a smooth transition. Still, it is unlikely that full-time roles would be required throughout the execution of the strategy.

The strategy is about changing behaviour and culture, which takes time and persistence. The implementation plan in Appendix B shows our suggested sequencing and highlights the implementation and ongoing activities over the next five years.

Oversight and Coordination

We have committed to exceptional customer service as a city-wide endeavour. Each department and branch have a unique role, ensuring the strategy is implemented effectively and cohesively. From frontline staff to senior management, responsibilities should be defined, promoting accountability and a seamless service experience for all residents and visitors. This collaborative approach is key to maintaining the high standards of service that we are known for.

Putting Customers First Steering Committee

To support and guide the implementation of *Putting Customers First*, we should establish a Steering Committee with responsibilities to:

- Implement customer-centric strategies to enhance departmental support.
- Develop and implement tools and experiences for customer engagement.
- Analyze customer data to inform business decisions and strategies.
- Partner with operational departments to address and resolve customer service challenges.

The Steering Committee champions *Putting Customers First*. As shown in Table 3, senior staff responsible for the plan's implementation and coordination form the steering committee.

Table 3: Putting Customers First Steering Committee representation and roles.

Putting Customers First Steering Committee	
Group	Role
Corporate Leadership Team	Change management
Human Resources	Leads on staff resourcing and labour relations
Legislative Services - Service Oshawa	Coordinates changes to Service Oshawa
Information Technology Services	Leads on GIS, Phone System, Software
Diversity, Equity and Reconciliation	Leads on Accessibility and Equity
Corporate Communications	Leads on Website and Connect Oshawa
Finance Services	Leads on customer service improvements
Recreation	Leads on customer service improvements

Putting Customers First Steering Committee

Operations	Leads on customer service improvements
Economic and Development Services	Leads on customer service improvements
Safety and Facilities Services	Leads on customer service improvements

Operating Departments and Working Groups

Working groups of subject matter experts from various operational departments should be formed to support implementation as needed.

Operating departments are essential in delivering specialized customer service experience. They use various tools to address customer needs and inquiries effectively. Operating departments will require regular collaboration with Legislative Services, which is crucial for evaluating and enhancing the quality of customer interactions.

In project development, the required capabilities include strong analytical skills to assess needs and challenges, creative problem-solving abilities to overcome obstacles, effective communication to ensure team alignment, and technical proficiency to implement solutions. Additionally, adaptability is crucial to respond to changing conditions and feedback, while leadership and collaboration foster a productive team environment. These capabilities form the backbone of successful project execution and management.

Staff Champions

A central aspect of the strategy is cultivating a culture centred on delivering exceptional customer service internally and externally, irrespective of one's role.

The emphasis is on fostering a shared understanding that providing customer service is a collective responsibility. This requires that everyone understands their role in responding to customer inquiries promptly and effectively, whether directing individuals to the right person or finding solutions to address their needs.

Staff champions play a crucial role in driving change. Staff champions offer daily assistance to fellow staff members, fostering a collaborative environment and encouraging innovation and responsiveness to evolving business needs. Leveraging staff champions elevates the collective expertise of individuals, empowering them to act as change agents within the organization.

Communication and Engagement

Communication and engagement are reoccurring themes in *Putting Customers First*.

Designing and developing effective communication for staff ensures clarity, engagement, and alignment with the program's goals. Crafting messages that resonate with the staff is crucial, highlighting why we want to change customer service delivery, their involvement and the program's progress. Regular updates, delivered through well-chosen channels, help maintain transparency and foster a sense of inclusion. Measuring the impact of these communications is also key to managing them effectively, allowing for adjustments as the program evolves.

Engaging all throughout the process facilitates buy-in and proactively addresses concerns. Frontline staff are directly involved in delivering customer experiences. Their insights and feedback provide valuable perspectives on customer needs, pain points, and operational challenges, ensuring that proposed changes are effective.

Measurement and Key Performance Indicators

Measurement involves systematically collecting data to assess the impact of change initiatives. According to the World Bank, governments looking to measure the degree of customer-centricity (customer-first approach) must integrate two types of measurements – administrative data from the municipality and “directly collected from customers regarding their personal experiences with and evaluation of public service delivery.”²⁶

Strategy 7 focuses on updating corporate-wide service standards and will define the key performance indicators. These should include both operational service standards and customer experience metrics to provide a fulsome view of performance.

Standards will explore the following:

- **First contact resolution rate:** The percentage of customer inquiries resolved at the first point of contact.
- **Service level:** The percentage of customer inquiries or issues resolved within a specific timeframe.
- **Average handle time or resolution rate:** The average time it takes to handle a customer inquiry or issue.
- **Digital adoption rate:** The percentage of customer interactions using online tools and platforms for municipal services.
- **Abandonment rate:** Percentage of customers who ended the interaction without resolving an issue due to a breakdown in the process.
- **Customer satisfaction score:** How satisfied customers are with the city's service
- **Customer effort score:** How easily customers interact with the City.

²⁶ International Bank for Reconstruction and Development/The World Bank, 2018. Indicators of Citizen-Centric Public Service Delivery, p.6.

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Tools such as sentiment surveys, awareness metrics, and participation rates can support customer data collection and further provide an understanding of overall performance.

In addition, given that the foundation of *Putting Customers First* is change management, several change management metrics exist to explore, including change adoption, speed of adoption, change readiness scores, staff engagement and sentiment, and training completion rates.

The final set of performance indicators will help us gauge the effectiveness of our change management efforts, ensuring alignment with project objectives and facilitating continuous improvement. Tracking these metrics enables us to make informed decisions, address resistance areas, and drive the desired organizational transformation.

Reporting and Plan Renewal

On an annual basis, we should produce a progress report on strategies and successes. Plan renewal should occur every five years and reflect updates to the Information Technology Plan, Oshawa Strategic Plan or any other relevant strategic plans for the City.

Conclusion

Putting Customers First reflects our commitment to delivering exceptional service and fostering strong relationships with our community. By fostering a customer-first culture, delivering high-quality and consistent experiences, advancing technology, sharing knowledge and driving continuous improvement, we aim to elevate the customer experience, ensuring that every interaction whether internal or external is meaningful, efficient and impactful.

This strategy builds trust and satisfaction among residents, local businesses, investors, community organizations, and strategic partners. It positions the City of Oshawa as a responsive and forward-thinking service delivery leader.

8. Appendix A - Research and Analysis

The following research and analysis were undertaken in 2023/2024 by Blackline Consulting to help shape *Putting Customers First: Oshawa's Strategic Approach to Exceptional Service*. Since this research was completed, the City has advanced several key initiatives to enhance customer service delivery.

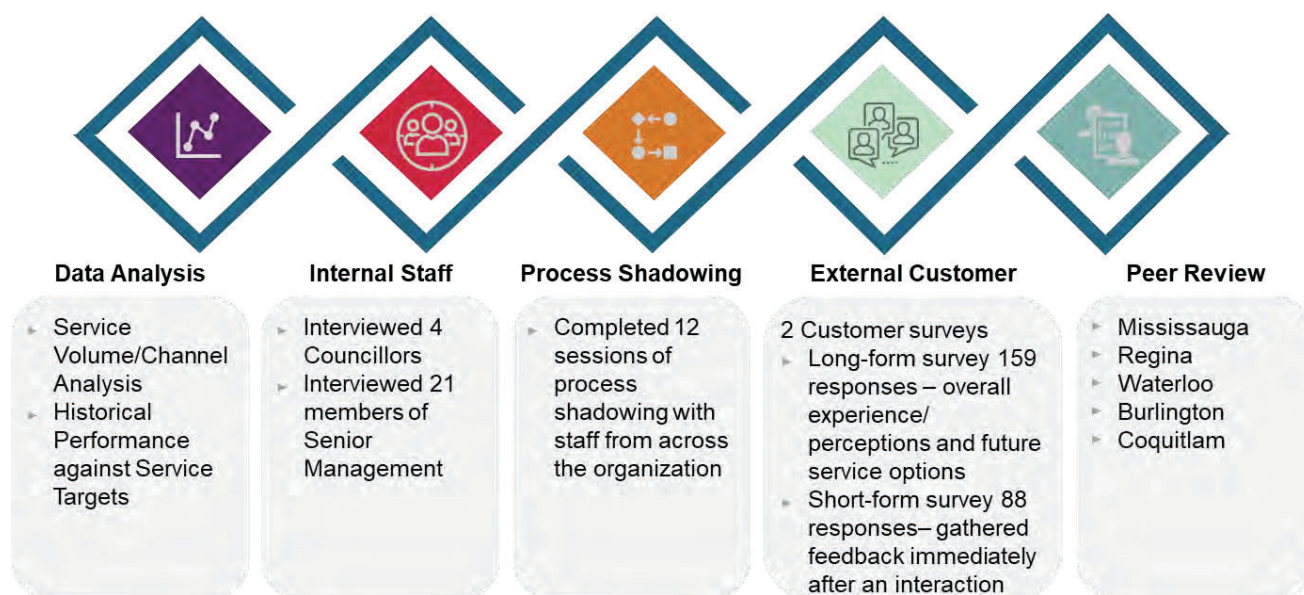


Figure 11: Process to develop Oshawa's customer service strategy.

Data Analysis

Customer preference for service is still via the phone (Figure 3), which restricts Service Oshawa (SO)'s capacity. As a service channel, the phone has its advantages: it is immediate, allows customers to discuss their requests in detail, and is personable. However, service via the phone is naturally limited to how many staff are available at the time to take calls. It is also a manual service, with staff needing to enter data and look up information for customers.

The City does not have computer telephony integration (CTI), so the onus is on staff to manually identify customer data and to document service requests in Lagan. SO online and SMS (live chat) see low customer service volumes compared to customers' stated preferences. This reinforces the idea that the City has an opportunity to increase the use of digital channels—the desire is there.

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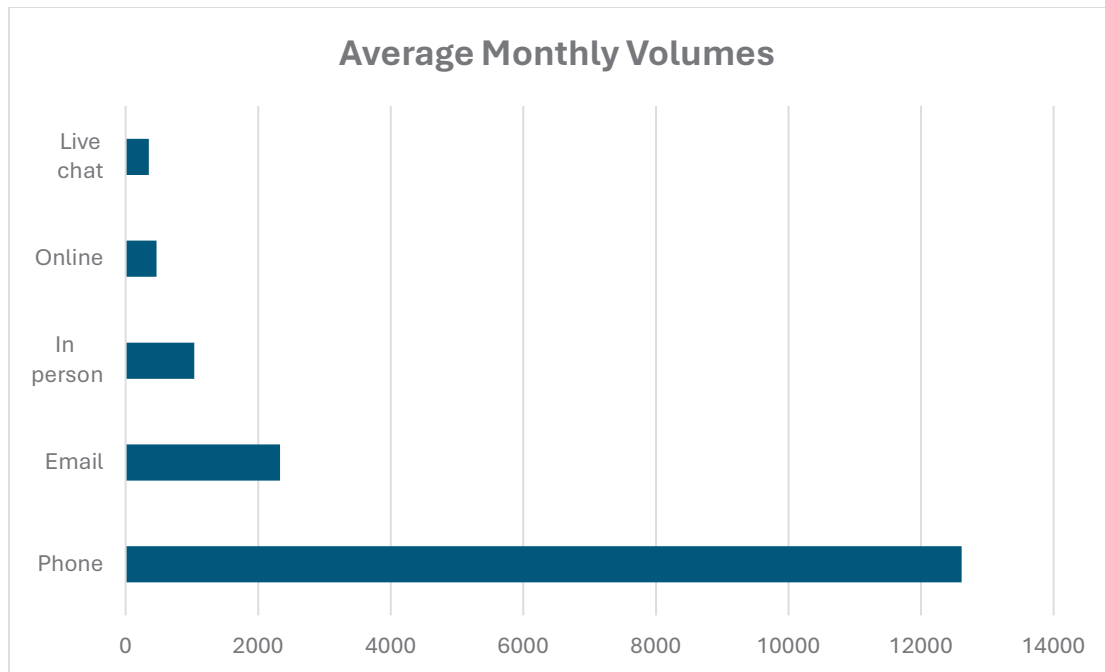


Figure 122: Average monthly call volumes.

If Oshawa shifts service volume from the phone to customer-led service through Service Oshawa online, it will be more likely to meet its service target without increasing the number of Customer Service Representatives to manage the phone queue actively.

Under the centralized model, customer service is generally effective.

Putting Customers First: Oshawa’s Strategic Approach to Exceptional Service

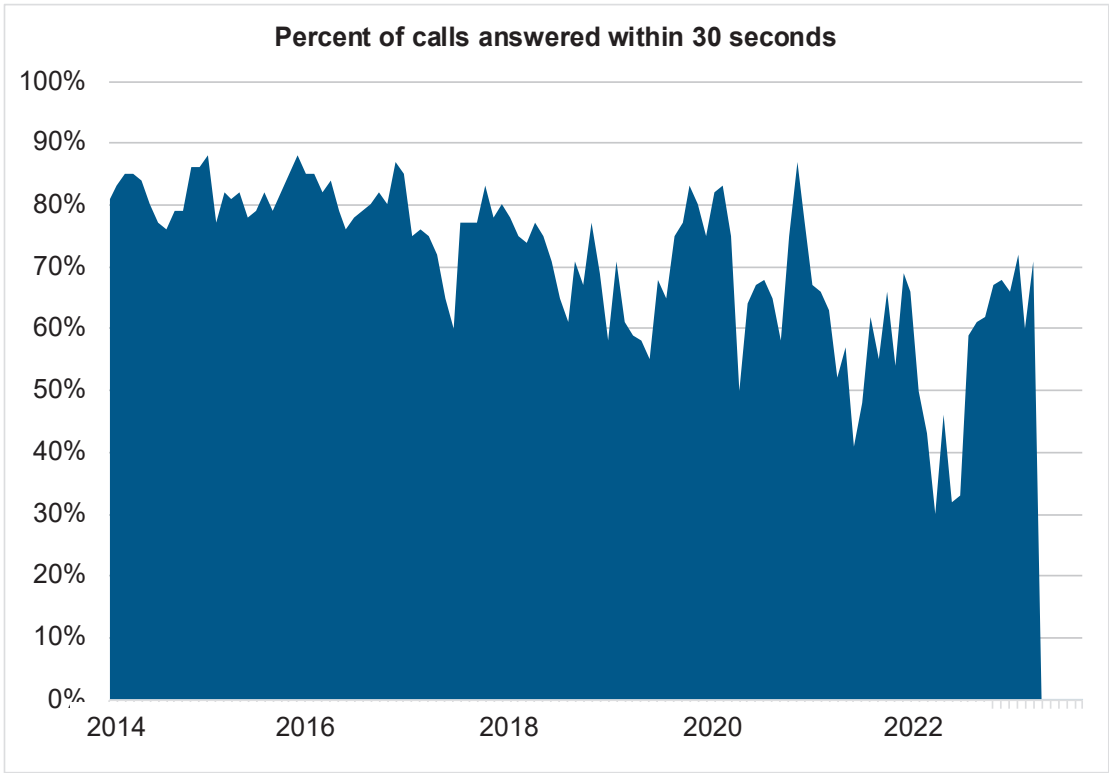


Figure 13: Percentage of calls answered within 30 seconds, 2014-2023.

Figure 13 suggests Service Oshawa is successful as a first point of contact for the City. The graph below shows how interactions in Lagan have been classified for the past four years.

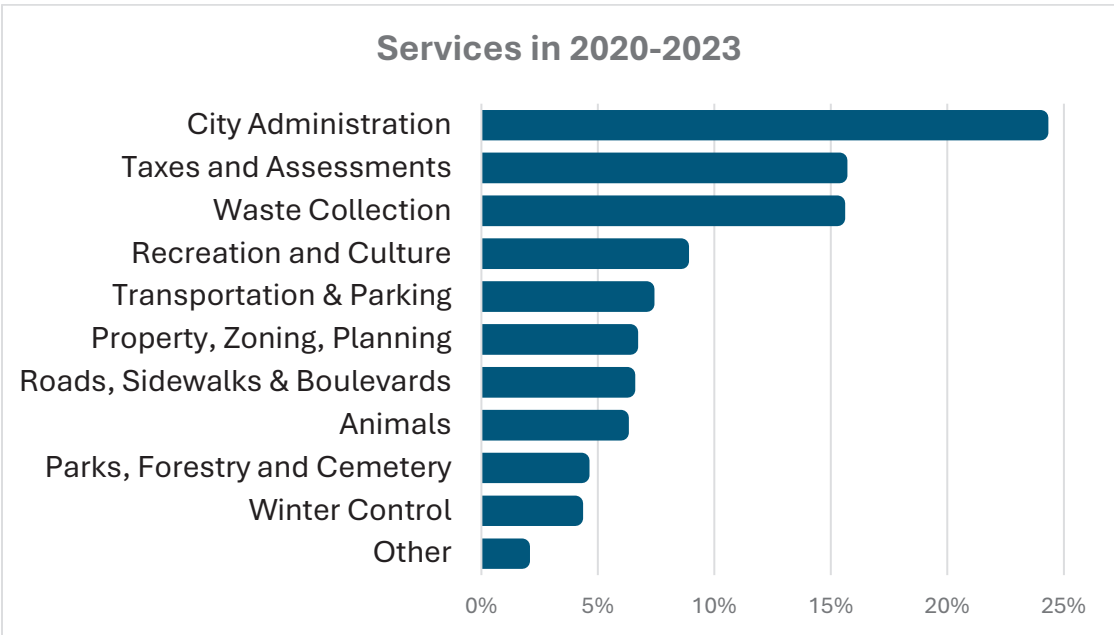


Figure 143: Services requested 2020-2023.

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Figure 14 shows that City Administration is the largest sub-classification of service interactions at nearly 25%. City Administration appears to see this high volume due to its breadth of services (for example, By-law ticket payments, Commissioner of Oaths inquiries, and transfers of calls received by Service Oshawa with a specific request for staff/other branches).

The other categories represent three-quarters of the call volume Service Oshawa manages. For these services, SO has the knowledge required to act on customer requests. This suggests a high first-contact resolution rate.

Customers can contact the City through five distinct channels, as shown in Figure 15. Based on the survey data below, the phone is the preferred contact channel for customers. This has implications for service capacity.

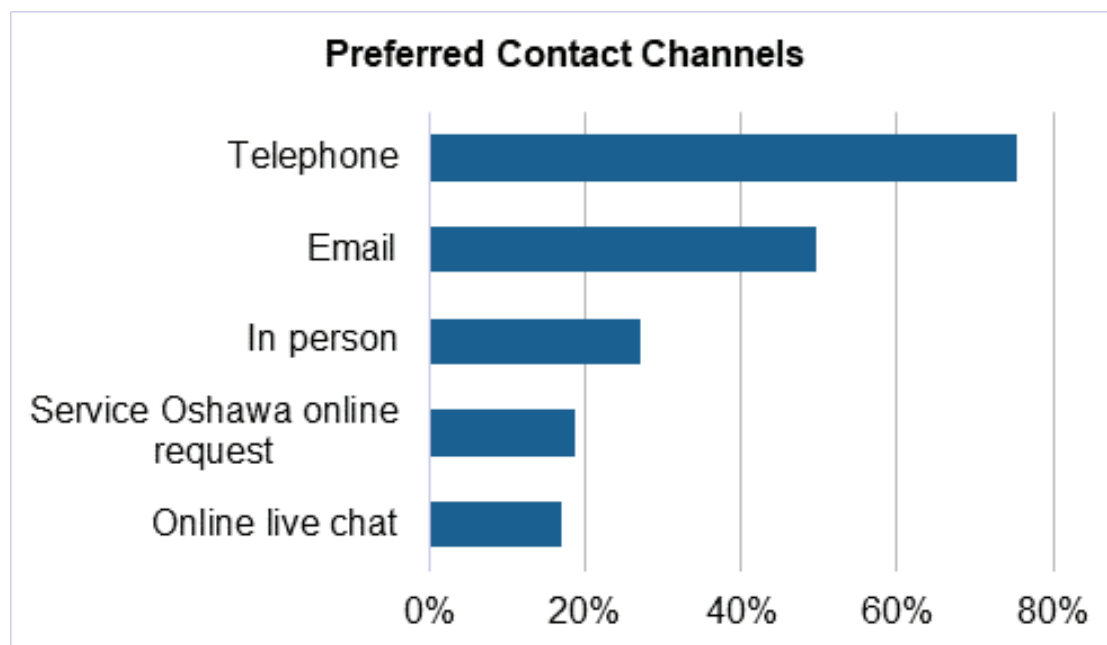


Figure 15: Preferred contact channels in the City of Oshawa, 2023.

Internal Consultation

Individuals were shadowed from 11 distinct service branches of the organization. The intent with process shadowing is to establish an understanding of how customer service processes are done today.

This familiarity allows us to assess the City's processes and make recommendations as part of this final strategy. Table 4 lists the service branches of the City we met with.

Table 4: List of City departments consulted.

City Function	
Service Oshawa	Tax Services
Mayor/Council Office	Recreation Services
Cemeteries	Roads Operations
Fire Prevention	Parks and Waste
Animal Services	Licensing and Standards
Building Services	

Process Findings

Based on the framework used, Table 5 below summarizes our findings.

Table 5: Process findings from observations and consultation with City departments.

Sub-Process	Observations
1.0 Develop customer service segmentation/prioritization	- All departments can create customized online forms, ensuring customer feedback is available for customer service representatives (CSR). Most departments rely on the SO-specific form and do not customize their own. SO analyzes complaints provided through the online forms and general feedback through the City's website. - Except for SO, no department has a formal process for analyzing customer feedback on their customer service experience to identify process improvements. - Security receives requests via phone for customers' needs outside of SO's operating hours. The inquiry is resolved if it relates to specific after-hours calls outlined by the operating departments; otherwise, the security guards do not provide support. Customers are asked to contact SO during their hours of operation. - Cemeteries receive verbal feedback after a service, but this information is not retained for reference.
2.0 Define customer service policies and procedures	- SO reviews customer service policies annually. Major changes to policies require approval from Council. - Departments outside of SO maintain their policies with various levels of formality. For example, Taxation has clear guidelines and policies, while these are undefined in Recreation. This gives rise to challenges, as inconsistent procedures and training lead to differing customer service levels across the City.

Sub-Process	Observations
3.0 Establish service levels for customers	• SO aims to answer phone inquiries within 30 seconds, 70% of the time. SO reports monthly on its performance against these service levels. • Most service requests from SO branches commit to a two-day turnaround for an initial response. • Service requests submitted to departments by SO have a service level associated with them. These service levels are set by the department responsible for that service. The service levels are based on the nature of the work. Service Level reports are produced monthly for the management team and Council.
4.0 Plan and manage customer service workforce	• SO employs Excel spreadsheets for multiple functions, such as calculating monthly expected volume, scheduling workforce rotations, tracking absenteeism and managing timesheets for payroll. Call volume statistics are used to establish the biweekly schedules down to 15-minute intervals. The process also involves assigning staff based on anticipated workload, with biweekly rotations featuring slightly varied hours. Absenteeism data, encompassing medical, sick, vacation and flex time, is recorded and managed in a spreadsheet. Time-off notifications are received through emails or phone calls, and relevant data is manually entered into PeopleSoft for time tracking. • Quality control measures in SO involve listening to two or three selected phone calls per CSR each month, providing feedback and jointly evaluating one random phone call with the CSR. • Animal Services uses a rotational scheduling system, with two staff members at the front counter. The rotation includes four desks: Desk 1 handles public greetings and inquiries. Desk 2 manages social media and supports Desk 1. Desk 3 coordinates foster and volunteer programs. Desk 4 oversees medications and inventory. • In Recreation, monthly scheduling involves full-time staff rotating early, mid and late shifts, while part-time staff rotate between facilities. Although the department is adept at scheduling and forecasting, challenges include high turnover rates due to staff moving to other city jobs. Employee burnout is also a concern. Addressing turnover and burnout

Sub-Process	Observations
	is essential for improving efficiency in Recreation's staff management and transaction processes.
5.0 Manage customer service requests and inquiries	• Departments outside of SO have differing processes for accepting inquiries in person, via email, phone, or via an assigned Lagan request. There is a variance between accepted payment types by department. ○ Cemeteries, Animal Services Licensing and Recreation accept all forms of payment. ○ Building Services is in transition to accepting online payments through CityView. • SO intakes inquiries in person, through email, phone, live chat, and the Service Oshawa Online portal. These channels are not managed as a unified queue of customers, resulting in an issue where calls, emails or chats are assigned to CSRs who may already be actively occupied with other inquiries. SO can receive all forms of payment and payment reconciliation is performed by CSRs at the end of their shifts. • SO has an effective system to handle a large inflow of in-person inquiries by using a button that calls for additional CSR to assist at the front desk, ensuring a prompt and effective response to resident needs.
6.0 Manage customer complaints	• The intake of customer complaints is not standardized throughout the City. ○ SO and Recreation use online complaint forms for customer complaints/feedback. ○ Fire complaints are logged as cases in Lagan. ○ Building Services and Taxation deal with complaints directly, as they typically come in by phone or email. ○ Licensing directs residents to SO's online forms. ○ Animal Services logs complaints in their Chameleon system. • In SO, when issues are escalated, they go to the Coordinator. The Coordinator listens, provides feedback and works on resolving the problem. Complaints are logged into Lagan and sent to the relevant department for action. • Outside of a service request, when residents submit a formal complaint about a service they receive, it may take up to 20 days for a department to respond. However, the City commits to keeping residents informed about the status of their complaints throughout the process.

Sub-Process	Observations
7.0 Measure customer satisfaction with complaint resolution	• Customers can share feedback on their experiences through forms on the City's website, accessible via personal devices or terminals at City Hall. • SO actively manages collecting and assessing customer feedback for inquiries related to various city departments. • SO systematically gathers statistics on customer feedback and disseminates monthly reports. • In Cemetery Services, while formal feedback collection is not routine, positive feedback is often received as thank-you emails.

External Consultation

As a component of *Putting Customers First*, the City conducted two surveys with residents.

1. A long-form survey intended to collect in-depth information regarding experiences and perceptions of customer service, facilities, the City website, and potential future customer service options.
2. A short-form survey intended to gather feedback immediately after a specific customer service interaction.

Both surveys were made available from September 11 to October 13, 2023, online and in paper format at all facilities. Paper copies of the short form were available at all service counters or using a QR code. Information and requests for feedback were offered after all interactions within SO, including after a live chat interaction.

The following responses were received:

- 159 respondents completed the long-form survey
- 88 respondents completed the short-form survey

As the survey was conducted using an opt-in methodology, no margin of error can be assigned to the results. Responses are unweighted.

Figure 16 indicates that most respondents are between 35-54 years of age, followed by those older than 55.

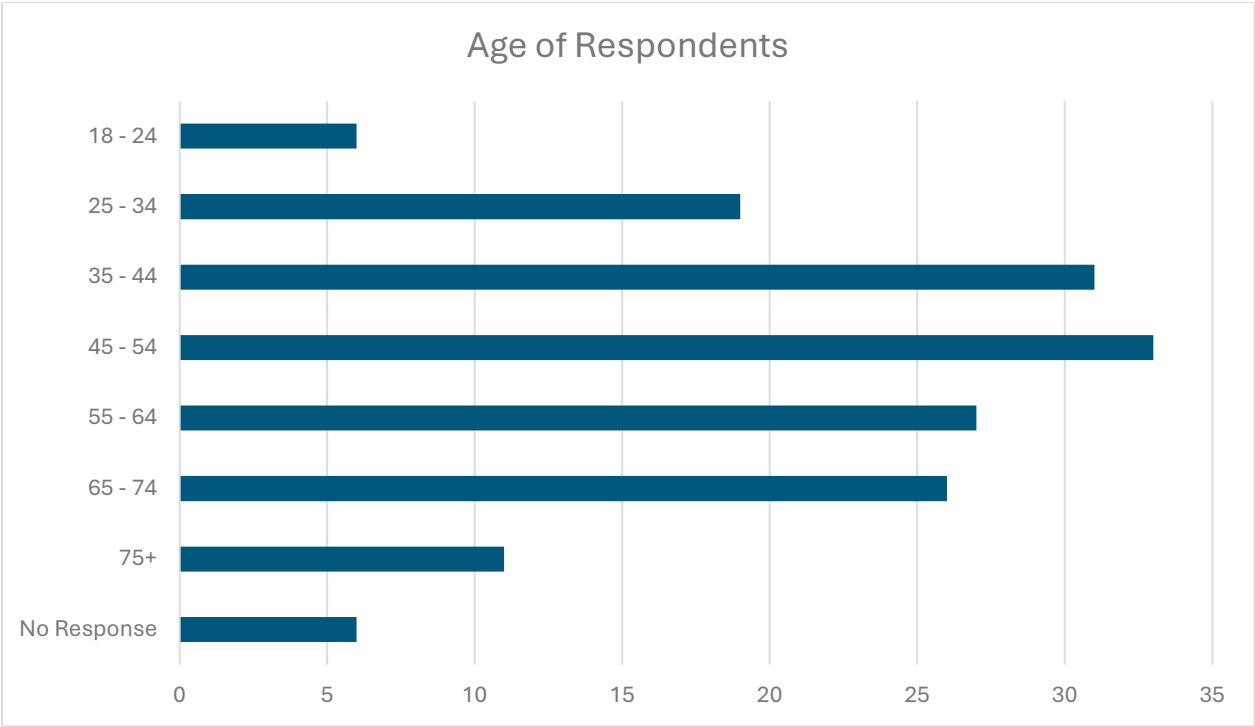


Figure 16: Age of survey respondents.

Figure 17 shows that most respondents are Oshawa residents or business owners, while Figure 18 shows the distribution of participation across Wards in the process.

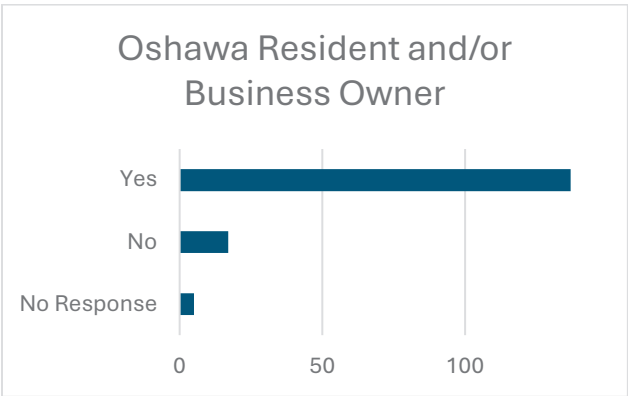


Figure 17: Identification as Oshawa resident, business or other.

Putting Customers First: Oshawa’s Strategic Approach to Exceptional Service

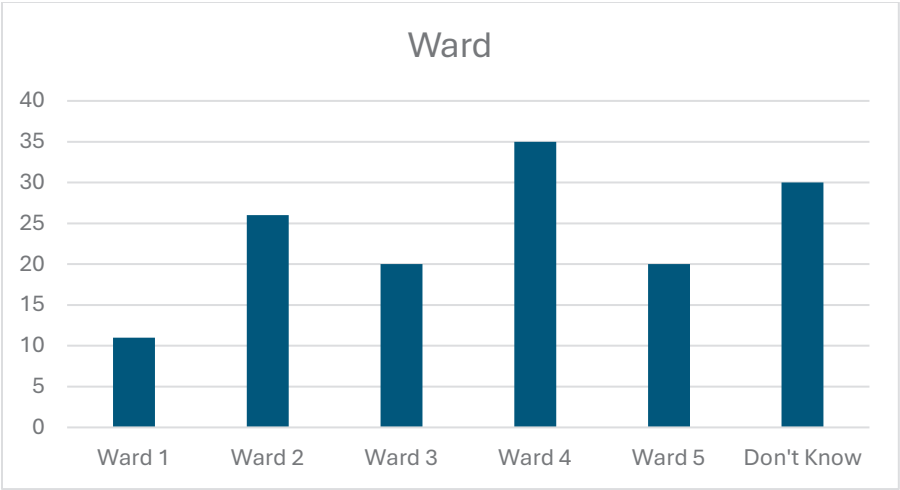


Figure 18: Representation of survey participants by Ward.

Figure 19 indicates that while many participants were aware of the survey through social media and email, many were informed by other means, such as the Shape Oshawa event held at the Oshawa Centre and staff promoting the survey after phone calls or when an online chat ended.

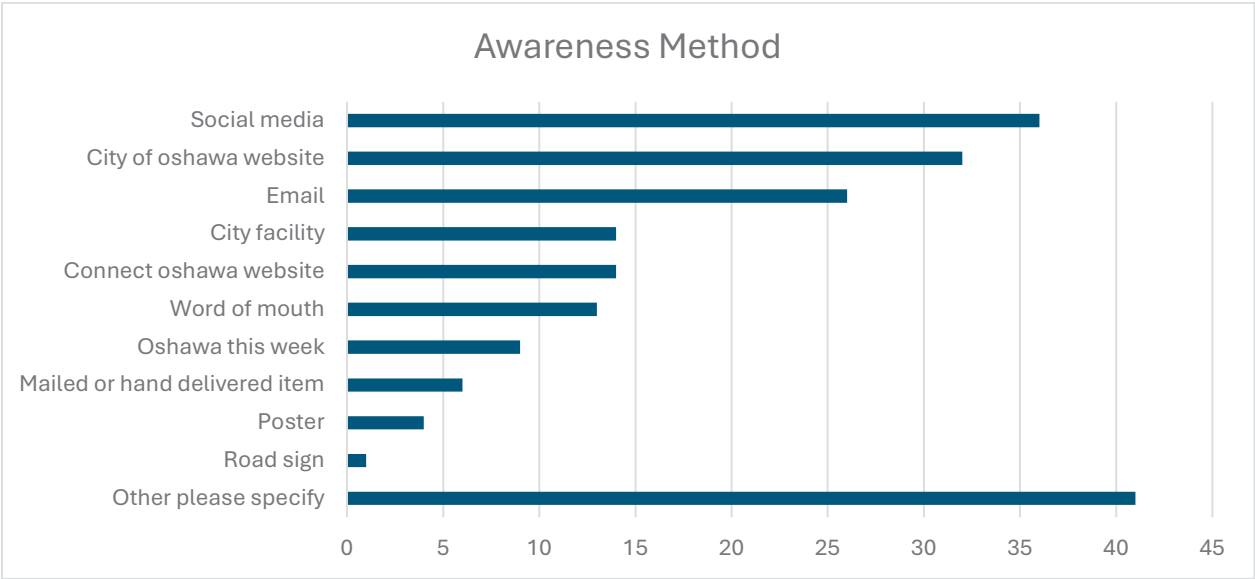


Figure 19: How survey residents became aware of the survey.

As shown in Figure 20, most respondents are happy with the service received. Feedback suggests Oshawa’s centralized customer service works well. Most respondents either strongly or somewhat agreed on the positive characteristics of the service.

Putting Customers First: Oshawa's Strategic Approach to Exceptional Service

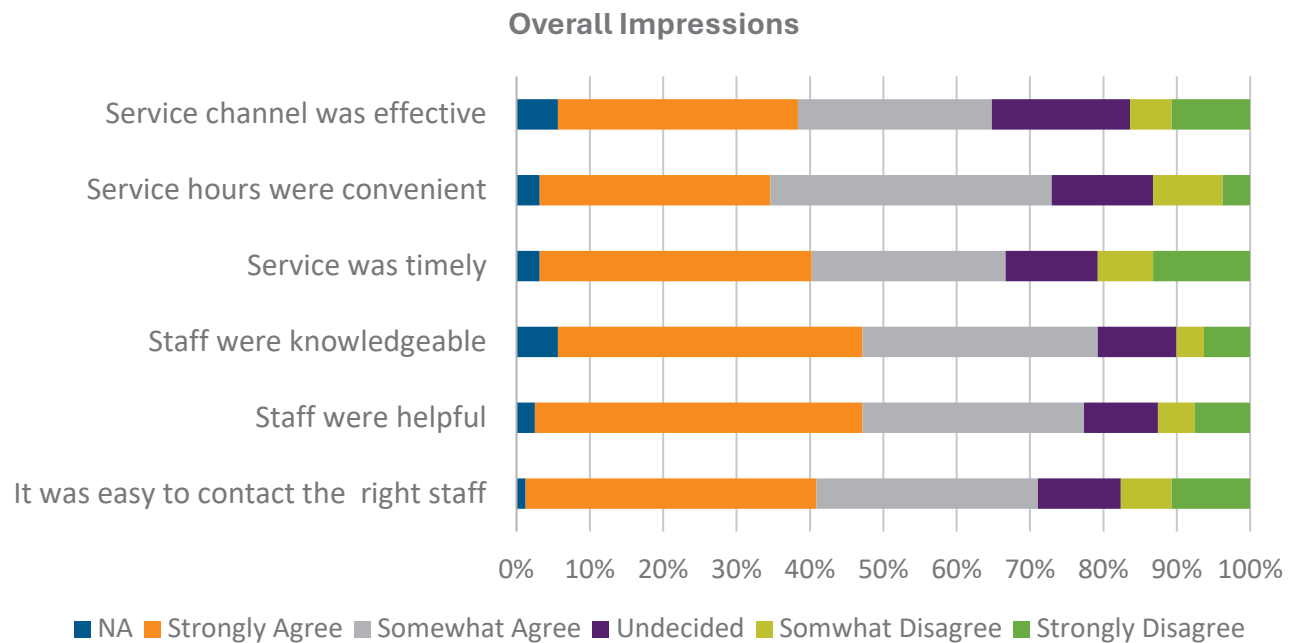


Figure 20 4: Overall impressions of customer service in the City of Oshawa.

The primary reason for a negative impression was that residents were told that they would receive a follow-up, but no one contacted them again. Respondents with a positive impression noted that staff are helpful and care about resolving customer complaints.

Figure 21 shows that as services became less about a specific transaction and more about general customer service, residents' impressions of the service became less positive.

Putting Customers First: Oshawa's Strategic Approach to Exceptional Service

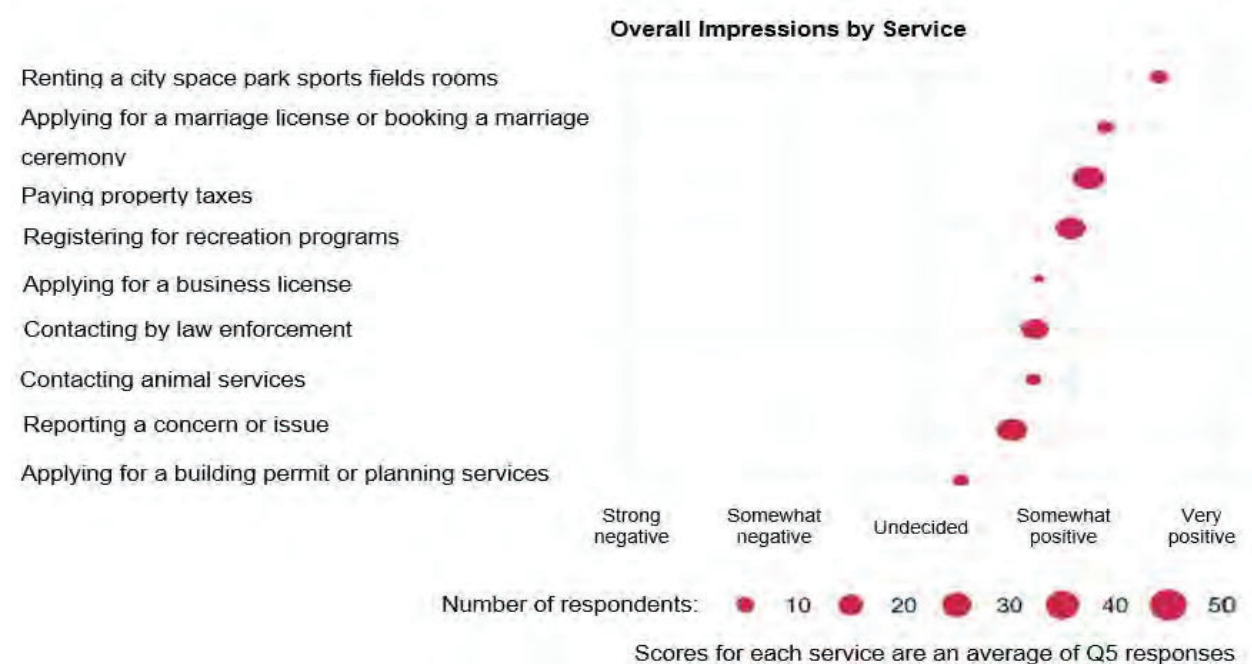


Figure 21 5: Respondent impressions relating to specific transactions with the City of Oshawa.

Peer Survey Results

Peer municipalities across Canada participated in the peer study as shown in Table 6. They also completed a qualitative questionnaire to give insight into their customer service activities. Participating municipalities provided statistical information about operations and finances.

Table 6: List of peer review participating municipalities.

Participating Municipalities			
	City of Oshawa		Region of Waterloo
	City of Mississauga		City of Burlington
	City of Regina		City of Coquitlam

Table 7 shows the services reviewed at peer municipalities, including customer service operations, operations, finances, and Customer Relationship Management (CRM) systems. It focuses on the specific services and areas listed below.

Table 7: Scope of services reviewed at peer municipalities.

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

Select Observations

The following are some of the key observations during the research:

Internal Communications and Customer interactions

- Most peers identified tracking escalations and customer transfers to operating departments as challenging. This is generally attributed to poor integration and a siloed approach to tracking customer interactions.
- All peers use telephone and email to communicate internally.
- Councillor service requests are generally made directly to operating departments, but some encourage using standard channels such as service requests.
- Regina’s City Manager's office has designated a Liaison Officer to manage all communication with Council. This includes creating requests in the CRM, following up with departments, and providing updates on the status of the requests.
- Burlington has a separate system for Council/customer interactions to comply with privacy regulations. Service requests are forwarded to Service Burlington for case creation, and Councillor Assistants have access to some information in CRM for case management.

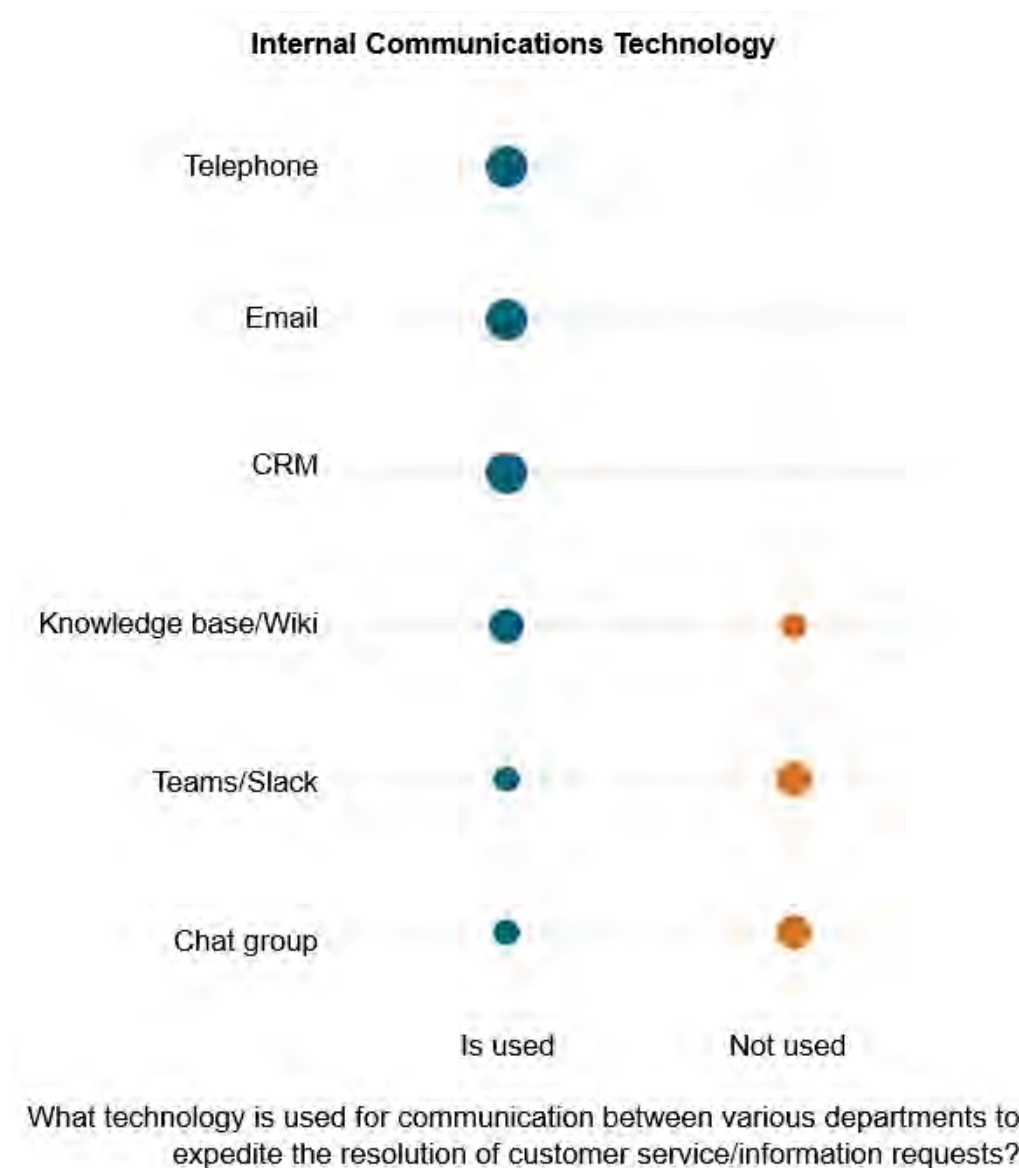


Figure 22 6: Peer municipality use of various forms of technology for internal communication to expedite the resolution of customer service requests.

- Most peers currently have formal complaint-handling policies or customer codes of conduct. Peers with these policies deliver customer service through centralized models. These teams can improve and standardize customer experience by developing and enacting policy.
- Peers are beginning to extend technology to support customer service operations and additional service channels (Figure 23).
- More peers have centralized operating models than decentralized ones, with most providing frontline service to at least some operating departments. However, peers' operating departments tend to retain some customer service functions.

Putting Customers First: Oshawa's Strategic Approach to Exceptional Service

- All peers use live agents and in-person service counters, but additional supporting technologies, such as response trees or IVR, are less prevalent, as shown in Figure 23. Asynchronous technologies such as live chat, texting and chatbots are rarely used. However, most are implementing new technology, including email management systems, live chat, online payment functionality or expanding online self-service options.
- Some peers are expanding the scope of their centralized customer service function by onboarding new operating departments.

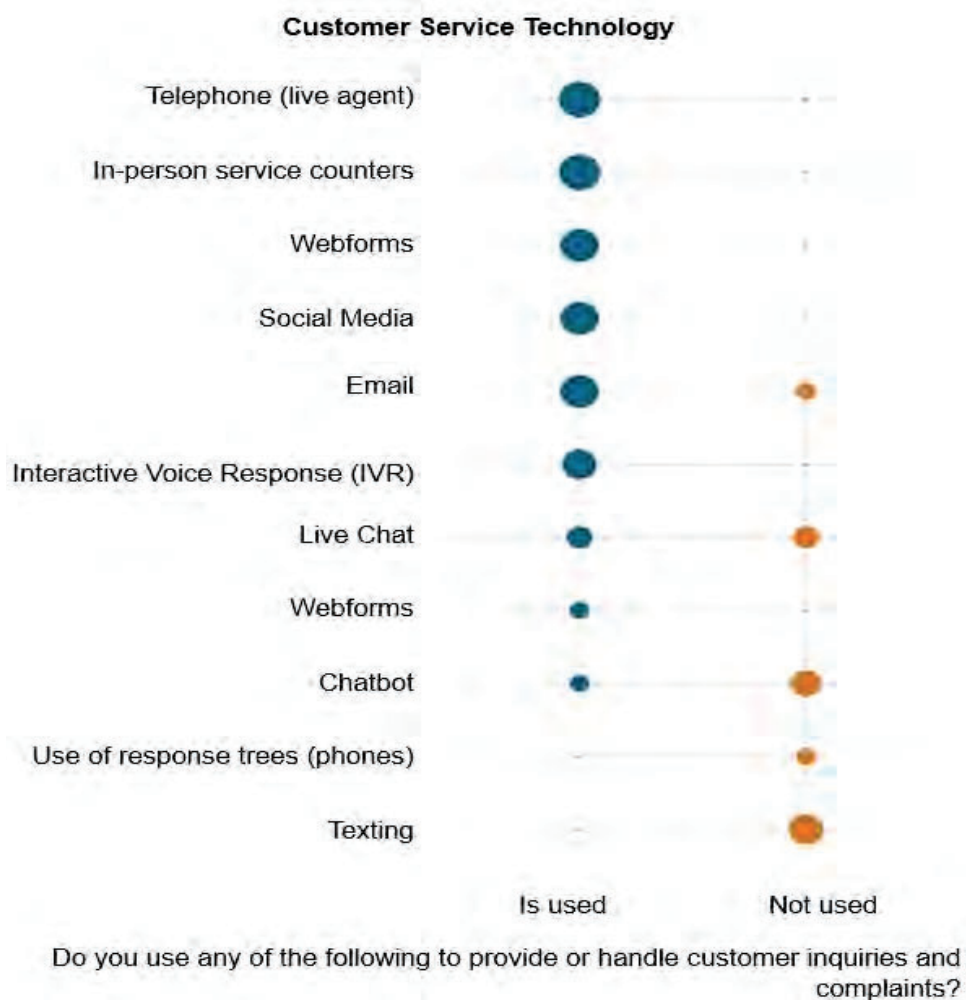


Figure 23 7: Peer municipalities' use of customer service technology to handle customer inquiries or complaints.

- Challenges faced by peers include communicating status updates to residents and meeting their service expectations, technology issues like outdated systems or lack of support and processes that are not customer-oriented.

Hours and Centralization

- Most peers offer service during regular business hours:
- Other municipalities offer services during typical business hours, usually from 8:30 am to 4:30 pm. However, in Mississauga, services are available for longer, from 7:00 am to 7:00 pm. Facilities providing services follow their hours of operation, which usually extend until at least 9:00 pm.
- Peers typically have a call centre or centralized facility to respond to phone calls. Some customer service departments are responsible for in-person service at recreation or community facilities.
- Most peers use a third-party service for after-hours requests, except for Waterloo and Coquitlam. Waterloo handles all after-hours requests internally, while Coquitlam does not have an after-hours service.

Customer Service Staffing Levels and Composition

As shown in Figure 25 and Table 8, most have similar staffing levels and rely on full-time staff:

- Peers usually have 0.5 FTE customer service staffing for every ten thousand residents.
- Most staff are employed full-time, although both Mississauga and Waterloo have a large complement of part-time customer service staff.
- On average, three-quarters of staff are frontline staff. Support positions include managers, supervisors, quality and knowledge management specialists, workforce management and business analysts.

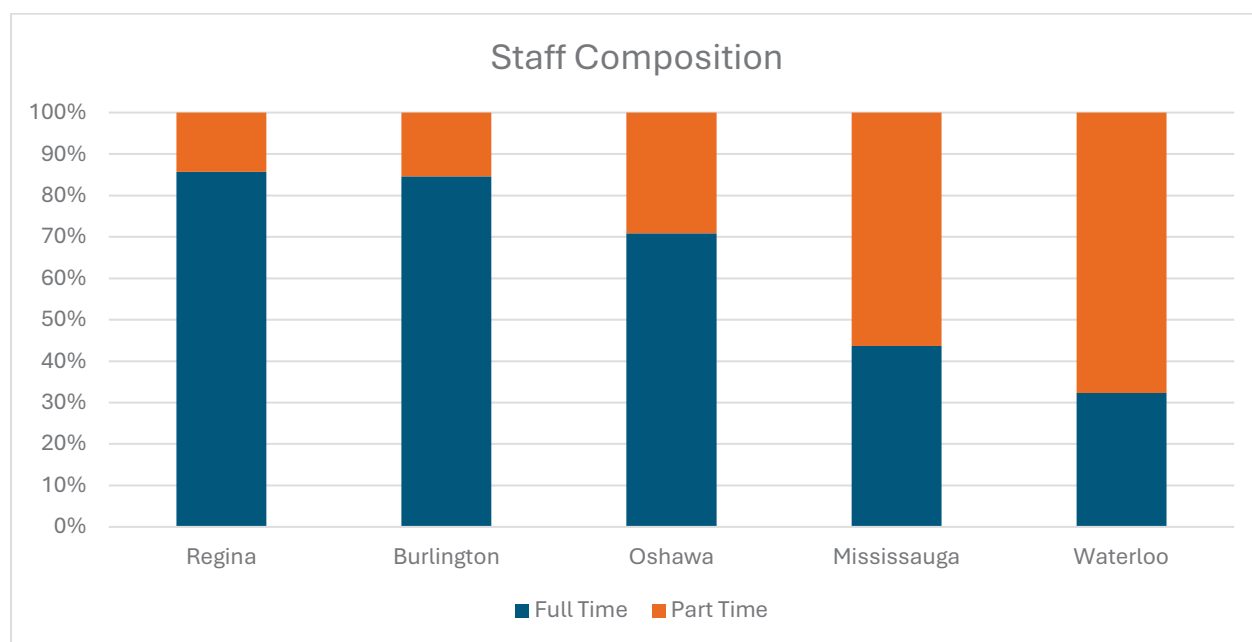


Figure 24 8: Comparison of staff full-time and part-time composition.

Table 8: Staff composition compared to population as of 2023.

Municipality	Full Time	Part-Time	FTE	FTE per 10,000 Residents
Regina	18	3	19.5	1.00
Burlington	11	2	12	1.15
Oshawa	17	7	20.5	0.95
Mississauga	24	31	39.5	0.42
Waterloo	11	23	22.5	0.35

Higher inquiries handled per customer service FTE are related to increased inquiries per resident. This indicates the importance of improvements to reduce inquiry volume and improve customer service activities' efficiency as the range and complexity of customer service activities increase.

Figure 15 below shows that Oshawa has a relatively high volume of inquiries per resident and per capita.

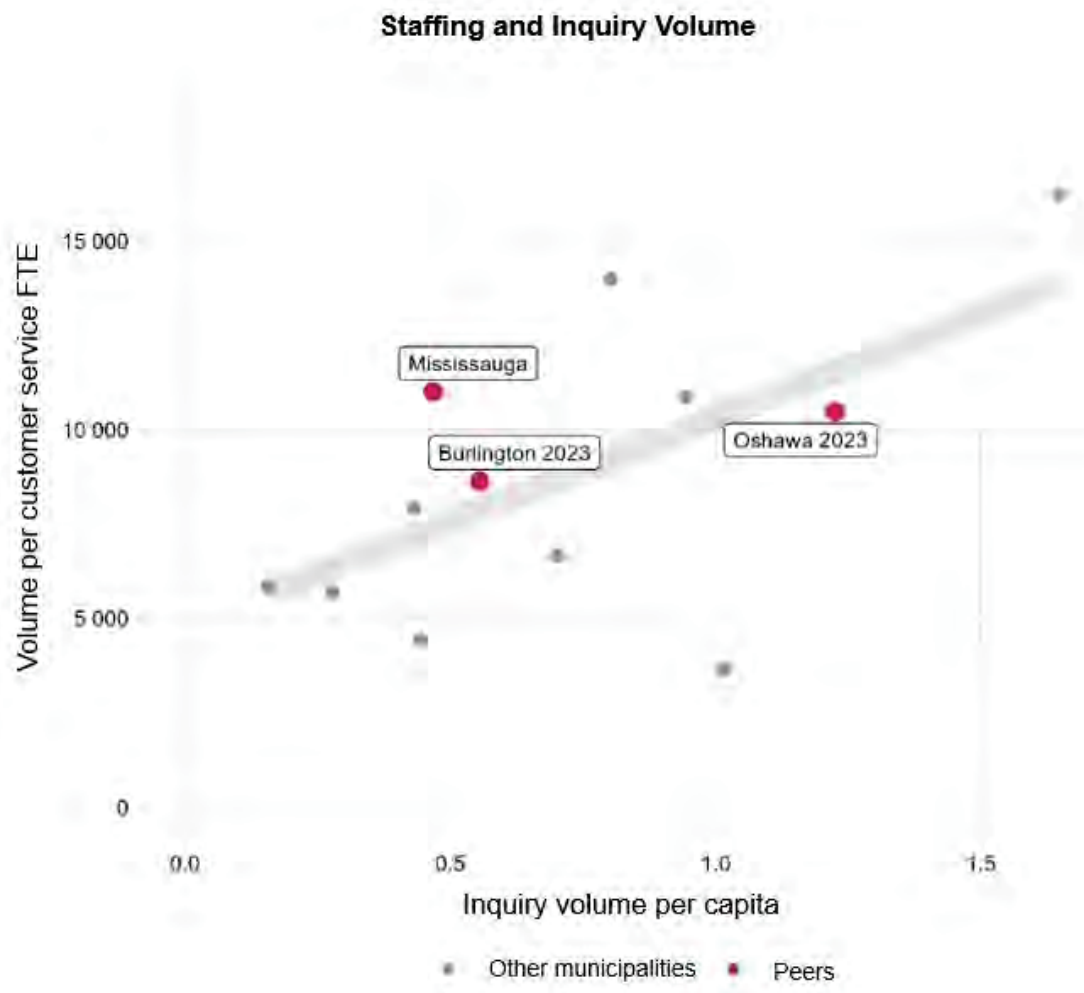


Figure 25.9: Staffing in relation to inquiry volume.

Most peers' customer service operating expenses per resident range from \$4.73 to \$11.15. Oshawa's customer service operating expenses per resident are \$10.26, which is on the high end of the range. This is due to the City's high customer service volume, which stands at 215,000 and is higher than its peers. If the City could reduce the call volume, it could reduce its total operating expenses, bringing down the cost per resident.

Salaries and benefits comprise most customer service operating expenses, ranging from 91% to 99%. As this makes up a large portion of operating expenses, having a higher volume of inquiries per FTE lowers direct operating expenses per inquiry. Oshawa's percentage for salaries and benefits is at the high end of this range, at 98.73%, and it is on the higher end of inquiries per FTE at approximately 10,000.

These operating expenses for Service Oshawa are offset by revenue generated through such things as the issuing of marriage licences, civil marriage ceremonies and Commissioner of Oaths.

CRM and Centralized Data

The peer group identified centralizing customer service data as the main reason for CRM implementation. The following trends were identified:

- Most peers currently use a CRM or have chosen one for implementation. Two peers use Infor, one uses Verint CM Pro, one uses Microsoft Dynamics, and one currently does not use a CRM. One peer uses Lagan the same way Oshawa does, even though its vendor, Verint Systems, does not actively support it. Its updated system is now the Verint CM Pro.
- Peers generally agreed that having knowledge base access is a key CRM benefit. However, most want improved integration with their broader application network. Peers have reported that their operating departments can independently handle service requests by accessing the CRM.

Table 94: Current CRM integrations of peer municipalities.

Municipality	Current Integrations
City of Oshawa	Maximo, ESRI GIS, OLI (soon to be CityView),
City of Mississauga	Cisco/Power BI
City of Regina	---
Region of Waterloo	Lucity
City of Burlington	Power BI, AMANDA, GIS, Mitel, TreePlotter
City of Coquitlam	---

- Among the peers, little integration exists between CRMs and other business systems. Table 9 shows current integrations. Only Mississauga and Oshawa handle their customer identity management through a CRM. Other peers use a second system with varying levels of integration.
- Other than Mississauga, most peers' CRM systems have little integration with the online portals customers use for service and information requests. Several peers are working towards improving integration.
- Some peers integrated their CRM with Power BI for reporting. Peers noted that CRM features that improve their ability to report on customer interactions, such as categorizing service requests and tracking response time, are most useful.
- Some peers have no customer service targets or KPIs, while others track customer service data against specific service level targets or general characteristics such as volume by channel.

Performance Measurement and Metrics

From the Peer group data, it is evident that there is a focus on quality, productivity and punctuality when measuring performance.

- Call quality monitoring is used for staff handling emails and calls.

Mississauga mentioned that these KPIs are discussed during quarterly performance development meetings, and data is provided monthly along with coaching to contribute to the performance review model.

Table 10: Current KPI's and Targets of peer municipalities.

Municipality	KPIs Measured and Target (if provided)
City of Oshawa	• Service Level – 70% of calls within 30 seconds • Average handle time • Agent re-queuing percentage • Call quality monitoring • Request types month over month • Daily averages by interaction channel
City of Mississauga	• Performance – 85% • Call logging – 99% • Postal code capture – 83% • Calls handled – 9/hour • Break punctuality - % instance in 5 minutes or greater • Not answering when a call is present – 5%
City of Regina	• Service level – 80% calls in 2 minutes • Call handle time – 5.5 minutes • Abandoned rate – 5% • Occupancy - <85% • Personal time adherence <1% • Overall Customer Satisfaction – 90%
Region of Waterloo	• Quality call and email monitoring
City of Burlington	• Request type – Service vs Information • Request Origin – Phone, Email, Visit, Web • Top requests – Trend of top inquiries • Call volume, Hold times, of calls handled, first point of contact

Per feedback from peers, departmental understaffing can lead to higher wait times and staff burnout, ultimately not meeting service standards. Some common service standards measured include:

- Call and email quality monitoring
- Service level
- Call logging
- Call handle time
- Shift/break punctuality
- Customer satisfaction
- Phone rings
- Calls not answered

Request Handling Methods

Oshawa, along with most peers, as shown in Table 11, provides the customers with a service request number to track their requests, and the service request transfers the ownership to the relevant operating departments for resolution. It is most common for the operating departments to have access to the CRM, which allows them to add and view case notes, ensure case closure and update the status of the requests.

Table 115: Comparison of peer municipalities' request handling methods.

Municipality	Method of handling request
City of Oshawa	Customers are provided reference numbers to track requests, and ownership of the request is transferred to the relevant operating department.
City of Mississauga	Customers are provided reference numbers to track requests.
City of Regina	The City transfers the ownership of the request to the relevant operating departments.
Region of Waterloo	Transfer the ownership of the request to the relevant operating departments.
City of Burlington	Customers receive a case creation email and a closed case notification. All follow-ups are attached to the original request/case.
City of Coquitlam	The City transfers the ownership of the request to the relevant operating departments.

When residents inquire about the status of their requests, customer service representatives can provide them with relevant information that has been logged into the CRM. If the requested information is not found, CSRs will either send a follow-up service request (if it is still open) or create a new service request (if it has been closed).

Some peers, such as Regina, have automated emails for case creation and updates until the case is resolved. Mississauga offers customers a self-service portal that lets them view the status of their requests using their service reference number. SO offers a similar self-serve portal that allows residents who have created an online account to see a high-level view of their service request status.

Innovative Customer Service Practices

Our peer analysis has found customer service practices that businesses are adopting. (Figure 26). These practices include:

- AI chatbots
- Chat feature
- Text feature
- External knowledgebase
- Video chat to confirm the ID for an in-person transaction
- Kiosks for payment
- Expand web chat hours
- Customer single sign-on
- Improving Customer Self-serve capabilities

The customer service features listed above would address some of the issues peers have identified in this report.

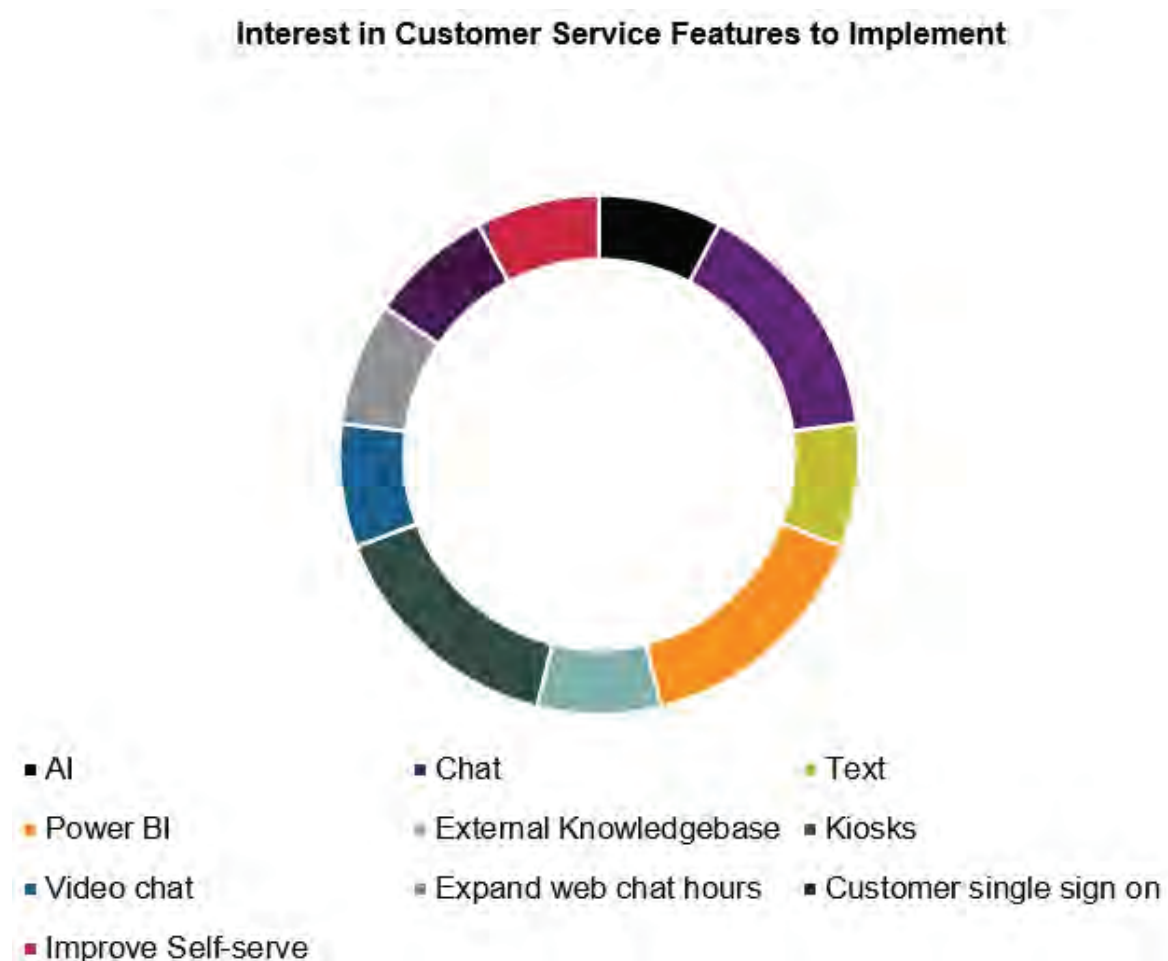


Figure 26 10: Enhanced customer service features that interest peer municipalities.

In conclusion, most peers are aligned with common goals.

Themes include monitoring performance, facilitating efficient request resolution, identifying the optimal approach to addressing Councillor requests, optimizing staffing and hours of operation, improving the implementation and use of their CRM system and enhancing technology.

Summary of Findings

The City structures its customer service function similarly to its peers. SO is the City's centralized corporate customer service function. It has served this role for 15 years and is a mature customer service team. Having a centralized customer service function was the common model among the peers we surveyed. Service Oshawa helps resolve customer inquiries and requests at the first point of contact.

SO uses customer relationship management software (CRM) to manage incoming customer requests and inquiries, and peers leverage similar software.

Most peers provided operating departments with access to their CRM system. In Oshawa, groups who receive service requests from Lagan have access to its data. Some operating departments use other systems that are integrated with Lagan.

Oshawa used Lagan since 2008. The vendor no longer supports the platform as of the end of 2023, and the City is currently upgrading the platform.

In some instances, the level of integration between the existing CRM and other city systems is limited, like that of peers. The level of integration with the existing system makes it difficult for the City to have a fulsome view of its customers and reporting. To mitigate this, some peers have connected Power BI to their CRM to enhance reporting and integrate data from other sources.

Departments also deal with customers directly, and some will make their requests through members of Council. All staff will interact with customers, both internally and externally, at some point in time.

Feedback from staff and residents indicated that the processes generally seemed to work well. However, the experience differed depending on the department and the person the customer approached.

This strategy considers how customer service functions across the organization, not just within SO.

Table 126: Summary of Findings.

Function	Summary of Findings
 Customer Service	Peer's operating models tend to be centralized. However, operating departments tend to retain some customer service functions. All peers provide support through live agents, in-person service counters and email. Peers are beginning to implement new technology, including live chat, online payment functionality, email management functionality, or expanding online self-service options. Most identified tracking escalations and customer transfers to operating departments as a challenge.
 Operations	Most peers provide customer service around standard business hours, though one provides 24/7 support. Some peers rely on third-party after-hours services to ensure their customers receive timely and efficient support, even outside regular business hours. Most peers have customer service staffing near one FTE for every ten thousand residents. Most customer service staff use full-time staff rather than part-time. On average, three-quarters of all customer service staff have frontline roles. Peers with a higher volume of inquiries per resident tend to have each customer service FTE dealing with a higher volume of inquiries, which is strongly related to a lower operating expense per inquiry.
 Financials	Most peers have similar per capita operating expenses. Salaries, wages and benefits make up almost all customer service operating expenses. A higher volume of inquiries per FTE lowers direct operating expenses per inquiry.

Function	Summary of Findings
 CRM Systems	Most peers currently use a CRM or have chosen one for implementation. Most use Dynamics, Salesforce or Lagan. Peers see the key benefits of centralizing customer service process control and improving knowledge base access. Most peers want to improve their CRM's integration with other department business systems.

9. Appendix B– Implementation Table

See separate table.

Oshawa Customer Service Strategy Appendix B Implementation Table

	Action Items	2025		2026		2027		2028		2029	
		1 & 2	3 & 4	1 & 2	3 & 4	1 & 2	3 & 4	1 & 2	3 & 4	1 & 2	3 & 4
	People										
1	Develop a Change Management Plan (CMP) to guide the City through Putting Customers First initiatives							Ongoing			
2.	Review staff roles and leverage technology to enhance capacity to support a customer-first approach										
3	Empower and train staff							Ongoing			
4	Strengthen customer service governance and follow-up										
	Processes										
5	Introduce customer journey mapping for all services offered							Ongoing			
6	Develop a plan for better access to services outside of regular business hours										
7	Update corporate-wide customer experience standards and develop guidelines and policies for all customer interactions										
8	Enhance in-person counter services									Ongoing	
9	Support data-driven decision-making to respond to customer trends and demands							Ongoing			
10	Connect with Durham 311							Ongoing			
	Technology										
11	Develop a technology roadmap for continuous improvements							Ongoing			
12	Expand and promote digital service options and reporting							Ongoing			
13	Update the corporation's telephony system										
14	Advance a self-serve portal							Ongoing			