

Business Case

Customer Contact Centre

Access Barrie



October 8, 2015

Table of Contents

1.0	Executive Summary	2
2.0	Desired Outcome	2
2.1	Current Decentralized Model	3
2.2	Moving to a Consolidated Model	3
2.3	Why now?	4
3.0	Assumptions & Considerations	4
3.1	Assumptions	4
3.2	Constraints	5
4.0	Technology and Customer Service	5
4.1	Communications Infrastructure	5
4.2	Knowledge Management	5
4.3	Customer Management Solutions	6
4.4	Benefits of a Contact Centre with CRM and KM	6
5.0	What Will It Look Like?	7
5.1	Departmental Reviews	7
5.2	Contact Centre Transition and Development	7
5.3	Phasing	8
5.4	Staffing	10
6.0	Municipal Comparators	11
7.0	Performance Measures	12
8.0	Recommendations	12
8.1	Form a Customer Contact Centre	12
8.2	Phase in Services	12
8.3	Develop Technology to Directly Support Customer Service	13
8.4	Develop a Corporate wide Knowledge Solution to support Customer Service	13
9.0	Putting the Plan in Motion	14
10.0	Financial Implications	15
11.0	Return on Investment	16
12.0	Alternatives	17
13.0	Change Management and Communications	18
14.0	Conclusion	18

1. Executive Summary

The City of Barrie Customer Service Plan is about raising the bar and taking the City's current decentralized customer service practices to the next level. By using best-practices, leveraging technology and maximizing existing resources, the City will adopt an innovative, centralized approach to customer service that can adapt to the changing needs and expectations of our community, while supporting best business practices.

The Customer Service Plan, as approved in principle by Council in September 2014 covered a wide range of services and options. Council gave direction to minimize operating costs where feasible. The costs associated with the plan are mainly related to the development of the Customer Contact Centre. This business case focusses on that portion of the plan.

The Customer Contact Centre will be designed to create a more customer oriented and easily managed model for customer service. It will enhance the service options, provide information to staff and customers, update guidelines, and serve the community in a wide variety of ways through phased in technology and customer service. The contact centre will unify our services, and enhance the ability that the customers and staff have in completing transactions. It will be a one-stop centre for providing quality customer service, by phone, e-mail, online and in person.

The Customer Contact Centre will allow for detail oriented and specifically trained staff to complete everyday general transactions for the customers on the first floor of City Hall. It will allow for customers to manage their own business with ease, while the staff will be able to complete the general dealings and support other departments.

As approved in principle by Council in September 2014, the Customer Service Plan holds the vision for the customer service experience to provide efficient, accessible, enhanced, consistent service, and by treating everyone – customers and employees – with respect. This aligns with the Executive Management Teams' mission of;

“To build a customer focused organization responsive to the community where all staff understand and embrace their fundamental role as one of serving the Community”

Access Barrie will work to ensure that the phased service transitions will be seamless to the customer, as well as make the transition smooth for the staff involved. A key underlying principle will be that as services are transitioned from departments into the contact centre, the resources that deliver the service will move with them. It is anticipated that a total of 14 existing staff positions will be transferred to the contact centre from the original departments. One new position is being requested through the 2016 Business Plan. The resource is needed to build and manage the customer information systems that are required for a successful implementation of a contact centre. This function is not an existing capacity within the corporation.

With a Customer Contact Centre the City of Barrie will be able to better serve our customers. Investing in new technologies such as Integrated Communications, Customer Relationship Management and Knowledge Management solutions to gain efficiency and consistency in customer care that will prepare us for the future growth of the City of Barrie.

2. Desired Outcomes

One of the City of Barrie's corporate strategic priorities was to “Improve and Expand Community Involvement and City Interactions” (Strategic Plan 2010 – 2014), as identified by the 2010 to 2014 City Council. The Customer Service Plan that was approved by Council in September 2014 plays a key role in moving us closer to achieving this priority. That plan was built upon the **Key Values** of Knowledge, Respect, Timeliness, Accessibility, and Adaptability with a dedicated focus on customer service and the customer experience.

The **Goals** of the Customer Service Plan are to enhance the accessibility for customer service functions, create a customer centred culture, fill the needs of the average city customer, and provide up to date and easily retrieved information through new technology solutions.

There is a strong business need for information about customers and the services that they use at the City of Barrie. Transactions need to be tracked, analyzed, and monitored to measure customer satisfaction and help enhance the customer service functions and guidelines. This information will also inform future business planning and project development and implementation.

As envisioned in the Customer Service Plan, a **Customer Contact Centre** will;

- Create a Call Centre that merges 40+ existing phone numbers into **ONE central number**.
- Provide a “one stop” customer **Contact Centre** for easy accessibility.
- Expand **mobile solutions** and leverage technology.
- Introduce a consistent **corporate-wide tracking method**.
- Create a **centralized knowledge base**.

2.1 Current Decentralized Model

Our current customer service model is not intuitive to our customers, as the customers are required to know the internal structure of the City in order to reach the department that can complete their request and in turn, each department is equipped to provide customer service along its specific area of responsibility alone. As a result, customers are often not clear on where and how to contact us for the more than 60 services the City provides.

This decentralized model has presented ongoing challenges to the corporation as the availability of defined data and analytics are either not available or inconsistently captured. Our mostly manual or legacy systems do not provide enough information or scope of information to adequately support business decisions in a variety of areas. Information, data and the ability to access, analyze and share it are an integral part to making better decisions, personalizing customer interaction, optimizing operations and innovation.

The current customer service procedures have been optimized to the best of our ability, but are stretched and at capacity. With the expected growth in the south end and increased public expectations, high quality service delivery levels cannot be met with the existing decentralized model.

With a decentralized model, customers have difficulty navigating the multiple points of access which include over 40 public facing phone numbers, 30+ counters, multiple emails with limited options for online or mobile service. Customer expectations are growing and it is now expected that public services match that of the private sector systems and levels.

2.2 Moving to a Consolidated Model

Having a consolidated model for customer service with a consistent approach to handling interactions and service requests through phone, in person and digital channels will provide opportunities for better service to the public and better information for the Corporation to use when planning for the future. Some of the benefits of this model include;

- Single point of access supports citizen centered service;
- Customer and department specific metrics will support business planning;
- Increased capacity to handle future growth;
- Allows for consistent levels of service during the peaks & valleys of demand;
- Dedicated staff resources will be expected to “close the loop” with the customer to increase customer satisfaction;
- Consistency in messaging to the customer through centralized resources and information;
- Reduces opportunities to “work the system” by making multiple requests through multiple channels;

- Easy for the customer;
- Provides for the ability to “backup” departments during peak seasons;
- Councillor support through provision of an accountable, trackable system for customers to be referred to;
- Captures and manages corporate knowledge in a consistent and systematic way.

2.3 Why Now?

Both the Corporation and the customer are changing. There are expectations from the public that customer service channels are efficient and effective and utilize up to date methods and technology. With established technology projects across the corporation, there are expectations within these projects that there will be an ability to integrate the customer experience and transactions across applications. The Customer Contact Centre with the associated technology would be that point of integration.

The City is on the verge of significant growth in population with the development of the south lands. With the influx of people and businesses, the demand and expectations will continue to rise. By making customer service convenient and easy to navigate for both the customer as well as staff, we will be able to focus on first contact resolution. Customers will have their query handled by the person who takes their request, or they will be directed to the correct staff resource the first time. Dedicated, trained customer service specialists will provide quality service in a One Stop Service delivery model.

By having access to accurate information, staff will be able to deliver consistent, efficient, quality interactions that will increase overall citizen satisfaction and will meet the ongoing needs of the Corporation as it grows and develops. The supporting technology will provide work-flow efficiencies that will enhance tracking for future analysis and ensure having an integrated view of the customer and customer interactions. This will provide better data and information for the Corporation for future planning.

3. Assumptions & Considerations

3.1 Assumptions

In the preparation of this overall Business Case the following base assumptions were considered and informed the underlying thought process:

- Transaction volume for phone calls. It is expected to have 1 - 1.2 calls/capita = 140,000 – 168,000 calls per year – the baseline standards for most municipalities. As Barrie grows, there will be a growth in requests for service. With Barrie’s population growth projection of 210,000 by 2031, it is anticipated that 210,000 – 252,000 annual calls will need to be answered.
- The benefits of consolidation will not be realized if the Contact Centre and technology are not developed together, and technology is required to implement.
- The Customer Service Plan was a Strategic Priority of Council and continues to be a key mission statement of the Executive Management Team.
- Departments will support changes and will supply resources to plan and implement the plan for a fully supported contact centre for customers. Staffing for the contact centre will be achieved through operational efficiencies within the departments.
- Barrie is consistent in its needs, objectives and benefits for customer service as other comparator municipalities. These same models of contact centres are being applied in other municipalities and have yielded the expected beneficial results.

3.2 Constraints

In the preparation of this overall Business Case the following constraints were considered and informed the underlying thought process.

- Resource availability at the corporate and departmental level,
- Accommodation and space allocation for the contact centre,
- Direction from council to limit operational cost increases.

4. Technology and Customer Service

The key to providing customer service in a contact centre environment is having well defined, integrated technology systems. Communications, Customer Management and Knowledge systems that organize, track customer service delivery, store information and the processes required to complete interactions with the Corporation are key to a successful operation.

The Communications Infrastructure, Customer Management and Knowledge Management solutions are integrated enterprise technologies that are specific to consolidating all channels of customer service in a centralized manner. When integrated with corporate pillar technology such as the Enterprise Resource Planning Systems (ERP), Applications, Permits, Licences and Inspection solution (APLI), CityWorks and GIS systems, the technologies work together to provide easily searched information and automated workflow between the customer request, the department that manages the service, and back to the customer to know the resolution to their issue or concern.

Technology will ensure accuracy, consistency and service quality. Technology will make servicing customers and locating specific information faster and more efficient as it would allow staff to build an easily accessed, comprehensive knowledge system of information specific to the City of Barrie. This would allow for simplification of processes and a consistent approach for common work and automated workflows to reduce inconsistency, errors and speed up processing time.

4.1 Communications Infrastructure

Corporate Communications Infrastructure is foundational/core equipment connecting all City sites with voice communications. The City corporate infrastructure is currently being upgraded to ensure that it meets voice and data communication needs now and in the future. The City of Barrie is moving towards an internet based voice communications solution based on industry best practices. This upgrade of the communications infrastructure will accommodate the City's customer service requirements and allow for the integration into current networking infrastructure. The systems necessary for contact centre operations are part of these planned upgrades.

4.2 Knowledge Management

Knowledge Management can be a major distinguishing factor in determining business success. The ability to create, acquire, retain, store, share, use and manage corporate knowledge long term will allow the City of Barrie to truly optimize services.

Knowledge Management and best practice sharing is good for business as it allows for faster and more effectively shared ideas and information. This allows the city to offer better service, serve our customers and support a committed team of employees by compiling information into a collective knowledge system that staff will have access to for consistent answers and direction. We need to transform information into something valuable, something that employees can access, apply to their jobs and serve our customers.

There is an overall corporate need for this function long term. Currently there are no dedicated positions or functions that build and maintain the knowledge of the corporation in a consistent and systematic way. A dedicated staff position is required to take on the task of working across the organization to identify gaps in knowledge, organize the knowledge, build and maintain that knowledge. This will ensure consistent, up to date information for all staff to access across all customer service platforms.

4.3 Customer Management System

In conjunction there must be systems to track and analyze the transactions that result from these customer interactions. A centralized **Customer Management system** will track the volume, type and resolution to all inquiries from all channels, this information can be used to identify trends and emerging issues city wide or neighbourhood specific allowing the Corporation to plan, communicate and work to better enhance those areas and the customer experience consistently.

4.4 Benefits of a Contact Centre with a Customer Relationship Management Solution with Knowledge Management

The **Customer Relationship Management (CRM) technology** helps manage all facets of the customer relationship. Combined with an integrated **Knowledge Management (KM)** system, a CRM will support:

- Customer service problem management, trouble ticketing and case management;
- A single view of the customer experience and history (customer data integration);
- Consistent treatment of the customer across channels;
- Real-time decision support (analytics) to understand customer intentions, and customize services and interactions accordingly;
- Real-time feedback and surveys;
- Future self-service systems, including,
 - Creation of issue/service requests online;
 - Web access for status updates/service changes/cancellation of service;
 - Auto notifications on completion of request and customer surveys;
 - Support for online request management, including mobile customers.

Further benefits include:

- **No customer request will be lost** as tracking of all interactions will yield a full history of inquiries and allow automated distribution of requests to the individuals responsible for service fulfillment and analysis. This also allows for review of problem areas and to identify opportunities for process improvements. There would be a centralized corporate view of customers across all channels to allow both the customer and the organization to see all interactions at all levels for better understanding by both parties. This provides a consistent treatment of the customer and supporting “closing the loop” with the customer to know the resolution of their concern and to track customer satisfaction.
- This contact centre will also provide a citizen centred model **to handle future growth** in demand for services as Barrie grows. With the estimated growth to a population of 210,000 by 2031, the resulting demands for service will also increase. Having the Customer Contact Centre may result in cost avoidance, as the staff required to handle the growth will be less in a consolidated model than spread out across several departments. The consolidated model will unify over 40 City phone numbers that will make calling and getting information for customers and easier. Documented procedures and general information in the Knowledge Management System will provide a tool for the delivery of consistent and accurate information to the residents of Barrie.
- Additional value for a consolidated model would be reflected as part of the **Business Continuity Plan**. This would include staffing and plans in the event of service disruptions due to emergencies. Contact centres are a quick and efficient format of conducting business resulting in increases to overall call capacity at a lower cost of operation. The high value of having a central point of contact for residents and staff in emergency situations have been well demonstrated recently through situation experienced by other municipalities such as Calgary’s flooding crisis in 2013.
- City staff will be able to direct **consistent and timely messaging** to one place for events, programs and services, which increases efficiency for staff in all departments due to better time management and availability of information. The single point of contact will be able to provide the City of Barrie with the ability to provide customer service for major events and emergencies in one central contact centre by scheduling

both full and part time staff to meet service demands. It will also make consolidating contacts possible and allow for complaints, wait times, and abandoned rates to be reduced.

The planning for this technology will focus on developing a request for proposals in 2016. Issuing, awarding and implementing the technology would be in 2017 – 2018. Technology would be implemented into the contact centre operations in phases. Without an integrated technology solution, benefits of consolidation will be limited, as the contact centre would still be relying on manual methods to transfer information between a multitude of departments within the city.

5. What Will It Look Like?

5.1 Departmental Reviews

To fully understand the scope of our current services and what opportunities and constraints were present, a comprehensive review of all customer service counters within the city was completed. The review included:

- Transactions currently being conducted and the staff and technology that deliver customer service;
- Current support systems, knowledge, challenges, and opportunities;
- Recommendations from current staff;
- Impacts to Customers, department & staff;

Overall observations for most areas include:

- Staff is engaged but tools and technology are not optimized for effective customer service.
- There are inconsistencies in interpretation of Customer Service between service areas.
- There is a need for general and specialized customer service training for staff at all levels to be able to support a consistent vision.
- Specialized areas have very specific training needs that are unique to their customer type.
- Administrative and customer service staff are one and the same and must multi-task with limited options for scheduling, handling peaks and valleys of service demands.
- There is overall support for Contact Centre concept from all levels of staff,
- The Finance customer service area is already operating as a mini contact centre. Finance staff currently provides customer services on a limited basis for several departments including, Bylaw, Transit, Environmental operations and parking services.

The results of the reviews and the resulting recommendations were shared with most Directors with regards to their specific department. This included the list of services and resources to transition. There was strong support throughout the organization and agreement on the recommendations from both Directors and the Executive Management Team.

The results and recommendations from the departmental reviews are reflected in the phasing of services and technology recommendations as part of the overall design of the contact centre business case.

5.2 Contact Centre Transition and Development

The transition to this new consolidated model will take time and must be done in phases. Phasing will ensure that we learn throughout the process, build on successes and ensure quality, consistency and accuracy while meeting the goal of enhancing the customer experience. It is expected that it may take 3 - 5 years or more to fully implement the Customer Contact Centre.

Subject to the support of Council, formation of the contact centre will commence in Q3/Q4 2016 with the blending of the existing switchboard functions from Access Barrie, the Information Desk functions of Legislative services, the front counter transactions from Finance - Revenue Services branch and the

report a problem functionality of Roads, Parks and Fleet. Additional services will be transitioned in phases into the Contact Centre one or two at a time starting in 2017. This process will ensure staff will be thoroughly trained in all aspects of customer care. The full, final schedule will be determined in consultation with department management based on seasonal requirements, need for technical integrations, departmental priorities, legislative requirements and risk mitigation considerations. Access Barrie will work to ensure that service transitions will be unified to the customer, as well as make the transition easy for the staff involved.

5.3 Phasing

Phase 1 – Form Customer Service Branch

FTE = full time equivalent

Service	Transactions to transition	Volume	Staff to transfer	Comments
Access Barrie – switchboard services	Phone	76,000	2 FTE	Switchboard services average 30 sec/call
	Counter	minimal		
	Digital	500		
Finance - tax/water payments, setup preapprovals, receive courier, deposits other dept., cheque pickups, document drop off, sell bid packages, transit passes, parking passes, garbage tags, parking tickets	Phone	36,000	5 Customer Service Rep's 1 Support Clerk 1 Supervisor	Average 3 minutes/call
	Counter	34,000		
	Digital	9000		
Legislative Services Welcome functions, Info barrie emails, pet licenses, online event calendar, directing and general information	Phone	limited	1 FTE equivalent	Currently filled by 2 PT Directing and general welcome
	Counter	9000		
	Digital	5900		
Roads, Parks & Fleet - general inquiries, report a problem, service requests & general information for winter control, roads, sidewalks, trees, parks concerns, streetlights, traffic signals, sports fields, sewers, parking lots, passes & meters	Phone	7000	1 FTE	Handling of complaints, service requests – est. 2 – 5 min/call
	Counter	minimal		
	Digital	2400		
Total Transactions to Transition		179,800		

Phase 2

FTE = full time equivalent

Service	Transactions to transition	Volume	Staff to transfer	Comments
Corporate Facilities – general inquiries, concerns and complaints, toilet rebates, Specialized Transit applications, liaison for facility users	Phone	1000	None at this time	Subject to meeting room bookings
	Counter	1000		
	Digital	minimal		

Recreation – general inquiries, concerns and complaints, Program registration, fees collection, special programs and event info	Phone	2500	None at this time	Not including Community Centres
	Counter	500		
	Digital	minimal		
Engineering – general inquiries, concerns and complaints, adopt a park, collection of fees, commemorative program, community garden plots	Phone	1200	1 FTE	Subject to the closing a counter
	Counter	2500		Additional services may transition subject to upcoming changes
	Digital	300		
Environmental Services - Landfill section – general inquiries, concerns and complaints, sale of garbage tags, pickup recycling containers	Phone	11,000	1 FTE	
	Counter	2000		Most counter will stay
	Digital	5500		
Total Transactions to Transition		27,500		

Phase 3 – subject to the Applications, Permits, Licences and Inspections solution implementation (APLI)

Service	Transactions to transition	Volume	Staff to transfer	Comments
Legislative Services – general inquiries, concerns and complaints, recycle bins, marriage license, burial permits, accept & open courier packages, accept statements of claim, amend voters lists	Phone	6000	1 FTE	
	Counter	6000		Deputy Registrar status required
	Digital	500		
Building - general inquiries, concerns and complaints, collection of fees, pickup of issued permits, booking of inspections	Phone	7200	to be reviewed	Subject to APLI and re-review of new systems and processes
	Counter	tbc		
	Digital	tbc		
Fire – general inquiries, concerns and complaints, fire permits	Phone	Tbc	None at this time	
	Counter	2000		Fire Permits
	Digital	3000		Fire Permits
Total Transactions to Transition		24,700		

Phase 4

FTE = full time equivalent

Service	Transactions to transition	Volume	Staff to transfer	Comments
Bylaw - general inquiries, concerns & complaints re: to animal control, parking, signs, lottery & business licenses, property standards & zoning, collection of payments.	Phone	23,000	2 – 3 FTE – to be reviewed	Subject to APLI and re-review
	Counter	tbc		Estimated at 22,000 Subject to APLI and re-review
	Digital	minimal		Subject to APLI and re-review
Planning – general inquiries,	Phone	1200	None at	

concerns and complaints, collection of fees	Counter	2000	this time	
	Digital	600		
Culture – general inquiries, concerns and complaints, accept applications, registration for events, Cheque pickups, brochure & invoice drop off	Phone	3500	None at this time	
	Counter	2000		
	Digital	1500		
Other i.e. HR, Legal, IT etc.	Phone	1000	None at this time	
	Counter	n/a		
	Digital	n/a		
Total Transactions to Transition		34,800		A lot of general information services, technical services will still be offered by departments.

Phase 5

FTE = full time equivalent

Service	Transactions to transition	Volume	Staff to transfer	Comments
Waste Water – general inquiries, concerns and complaints	Phone	2000	None at this time	
	Counter	n/a		
	Digital	minimal		
Water Operations – general inquiries, concerns and complaints, pool fill requests, Dig Smart locate requests, billing inquiries, construction inquiries, water quality, high consumption concerns, temporary water permits, requests to shut off valves and shut off water	Phone	4000	1 FTE	
	Counter	minimal		
	Digital	8000		
Total Transactions to Transition		14,000		

5.4 Staffing Requirements for the Contact Centre

The Customer Contact Centre team will be built by transitioning an estimated 14 existing positions from a variety of departments. A key underlying principle will be that as services are transitioned from departments into the contact centre, the resources that deliver the service will move with them. This approach will help staff and customers adapt to the new contact centre environment. The redeployment of staff will minimize the impact on the operating budget for the overall implementation costs of the contact centre. This system of consolidated service will better manage routine calls and develop a consistent approach to common work as the contact centre will help manage customer interactions more efficiently and effectively.

Customer Service Representatives and Supervisor

These existing transferred positions, are key customer service roles for the organization and will answer all service inquiries and provide corporate customer service through all service channels including; phone, email, counter and Web technologies in the centralized contact centre.

The staff complement will be filled by internal transfer of resources that are currently delivering services at the departmental level to the contact centre. Specialized training of these current staff members will ensure that they are better equipped to perform their jobs. This will keep the information and services for customers consistent across all channels.

The Knowledge Management Co-ordination

In reviewing the corporation, there are currently no dedicated positions or functions that capture and manage the knowledge of the corporation in a consistent and systematic way. A staff position is required that would take on the task of identifying our gaps in knowledge, organize, build and maintain that knowledge. This role is required as early as possible in the plan as documenting and building the knowledge system will take considerable time and without it no other technology can be implemented. Funding for this position in 2016 will be included in the 2016 operating budget as a requested new full time position.

Major Responsibilities of this new staff position:

- To assist in the development of a system to track and maintain City of Barrie customer service knowledge and processes for use in a Customer Contact Centre environment.
- To acquire, develop, manage and maintain departmental information in the Customer Contact Centre knowledge system.
- Liaise with department business units' contacts to ensure the knowledge system and CRM are optimized for use by the Customer Service Staff in a manner that support citizen-centred service.
- Create, update and maintain a knowledge system to ensure the latest content and information is always available.
- Continually audit and edit all knowledge system entries to ensure they are accurate.
- Generate and distribute reports.
- Become a City of Barrie expert to anticipate customer queries.
- Proactively create knowledge system articles to communicate answers and resolutions based on research.

6. Municipal Comparators

As detailed in the Customer Service Plan (Appendix "C"), thirteen municipalities were studied and were found to have, or were moving towards, integrated **one-stop service counters** offering a full range of municipal services accessible through multiple channels – counter, phone and email. Most front counters serve as the single financial transaction point for the majority of departments and services. These municipalities include; Kingston, Guelph, Brantford, Halton Region, Hamilton, County of Simcoe, Ajax, Markham, Newmarket, Oakville, Ottawa, Kitchener and Oshawa. Some common practices include;

- **Central contact** – In addition to the one-stop service counters, most municipalities also provide one central contact (i.e. one phone number, one email address) as the first point of contact to access City services. The majority of phone services use an initial automated attendant for callers followed by live answer as the next option.
- Some have **extended hours** of operation but the standard times are Monday to Friday from 8:30am to 4:30pm.
- Are using or moving towards **Customer Tracking technology** to consistently track, measure, and report on customer interactions through the use of Customer Management systems with integrated knowledge systems. These systems use computer software applications to manage all aspects of customer interactions within the organization including collecting, storing and analyzing customer information.

7. Performance Measures

Once the **Contact Centre** and associated technology is operating, real time monitoring and evaluation will be used to ensure service quality. Currently there is no comprehensive data on call volumes, service quality and call types across the organization. Ongoing measurement will ensure that we meet the service levels and performance targets which will be based on industry standards and business needs as well as help with the ongoing growth within the city.

Subject to acquiring the Knowledge and Customer Management technology, typical measurements that will be available will include call handle time, abandon rate of calls, costs of calls, number of calls answered, agent quality and completion, as well as number of service requests. These reports can be customized by department, service type, ward, neighbourhood or overall subject to the needs of the business units, the senior leadership teams or Council.

Performance Measures that may be tracked with the introduction of enhanced online and mobile services include the number of services offered, requested, submitted, transactions completed online, as well as the reduction of expenditures and measures of customer satisfaction. Performance measures will be established as part of each phase of the Contact Centre expansion and will be reported to Council.

8. Recommendations

8.1 Form a Customer Contact Centre

Phase one of the implementation plan will be to amalgamate the resources from Access Barrie – switchboard services, a portion of the Revenue Branch of Finance, Information desk functions of Legislative Services and service request functions of Roads, Parks & Fleet. The Customer Contact Centre would be a One Stop Service area for most general city services, and would be available on the first floor of City Hall at the existing Finance counter.

Customers would no longer have to navigate the nine floors of city hall as well as other offsite locations to complete their general business as the counter would accommodate most general services. Consolidating the 40+ public facing numbers to 705-726-4242, having a main counter and dedicated email supported by dedicated customer service representatives will allow the provision of first contact resolution. This means, the person who first receives the request provides the service or with more technical requests, will connect the customer with the correct staff person in the correct department the first time.

A Customer Contact Centre will provide consistent service with dedicated staff that will be specifically trained and supported by technology and resources designed to provide a positive customer experience.

8.2 Phase in Services

The transition from a decentralized model to a consolidated model for Customer Service will be a phased implementation to ensure success as staff learn and build off of each phase for better productivity, enhanced customer interactions and support department operations. This phased implementation will also allow the costs associated with the contact centre to be spread over several years to decrease the impact of the financial needs of this project.

Intensive training will ensure a fully informed customer service staff to be able to manage all customer queries. By having dedicated customer service staff handling most general customer queries, department technical staff will be freed up to more effectively manage their time to focus on the truly technical nature of their jobs.

By the final phase of the Customer Contact Centre, 14 existing staff positions and associated services will be transitioned from the original service department into the contact centre where the services will now be offered. This transition is expected to extend over 3 - 5 years.

8.3 Develop Technology Solutions to Directly Support Customer Service

The Customer Contact Centre will be the first point of contact for all service channels including counter, phone, email and social media. The customer service functions use of technology will unify knowledge and track interactions for future processing and analysis. Using the technology of Integrated Communications, Customer Management and Knowledge systems, the contact centre will be able to provide quality, consolidated and consistent service delivery regardless of the channel being utilized. Customers will be able to pay for, request, inquire about, apply for, register for and provide feedback on City programs and services. The dedicated customer service staff will be cross-trained to work in all service delivery channels including, phone, counter and digital platforms as well as trained in a multitude of different departmental information and applications.

The Contact centre's Communications, Customer Relationship Management and Knowledge Management Technology will be utilized to manage calls, retrieve documented procedures and information, record customer contacts and track service delivery history. A key concept is to ensure effective integration with existing corporate pillar technologies.

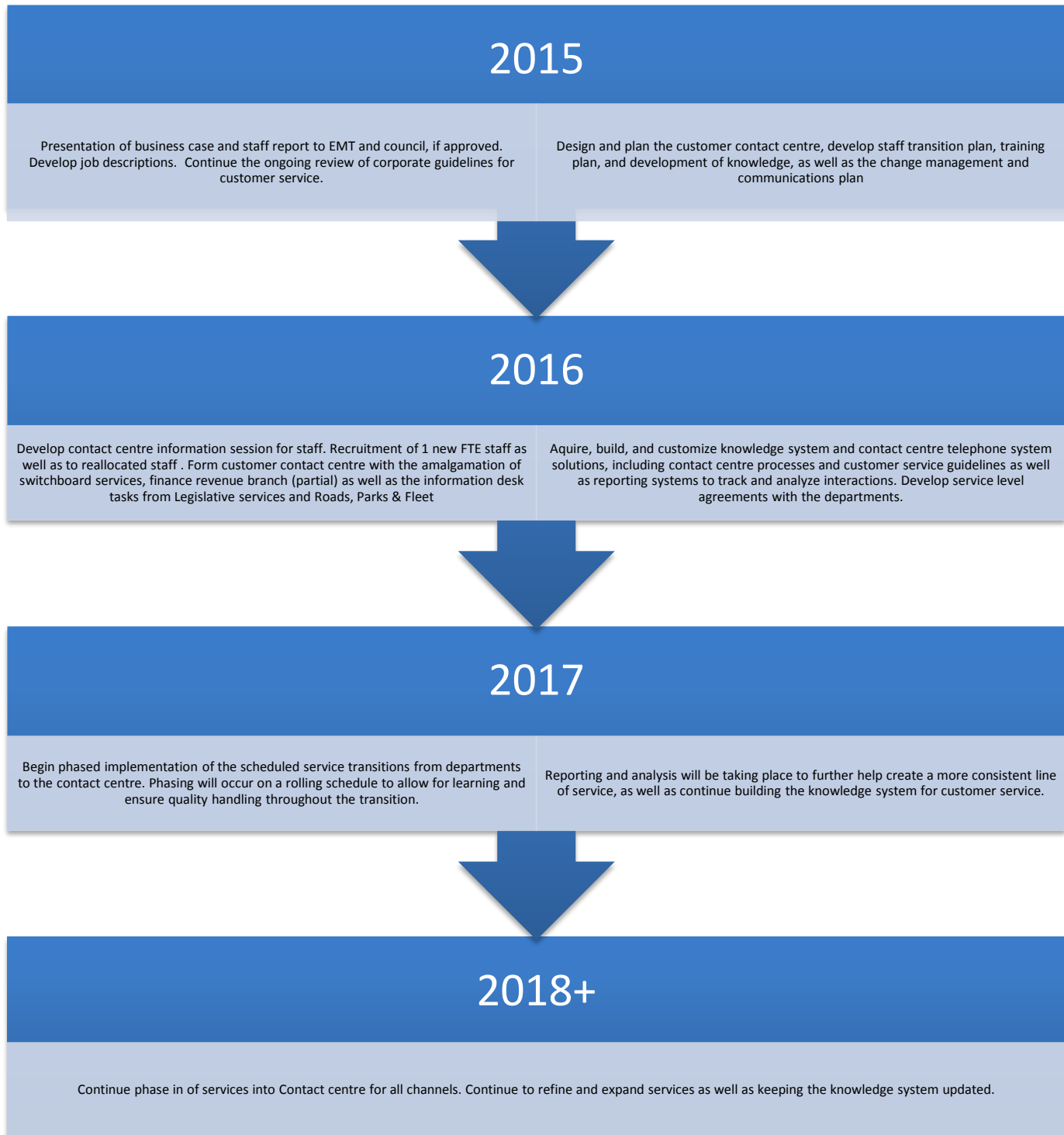
8.4 Develop a Corporate Wide Knowledge System to Support Customer Service

Key to the development of the Customer Contact Centre is the development of the Knowledge system. This function has been started through the research for the overall plan and through various projects across the corporation that are currently in progress. The information is currently in a very rudimentary format and this information must now evolve and be managed in a way that can be functional. Currently this is not existing function of the corporation.

Access Barrie is requesting one new fulltime permanent position as part of 2016 business plan. This position is a key requirement for the contact centre. Key tasks will be to organize the customer service knowledge of the corporation in a consistent and systematic way that supports contact centre functions.

9. Putting the Plan in Motion

If approved by Council as part of the overall 2016 budget and business plan, extensive planning and preparation for first phase implementation will be undertaken.



10. Financial Implications

Anticipated Costs for the Contact Centre

The costing for this plan focused on the development of direct Contact Centre functionality to support Customer Service and looks to leverage existing systems, staff and technology wherever possible. The capital outlay for the CRM in particular will look to build off of existing corporate pillar technology to ensure compatibility with existing systems and reduce future costs of integration and support.

Financial – Capital Costs

	2016		2017		2018		Totals 2016 - 2018
CRM	RFP Development	\$50,000	Setup and startup use in Contact Centre	\$350,000	Expand functionality	\$250,000	\$650,000
Technology	Monitors, screens	\$20,000		\$5,000		\$5,000	\$30,000
Facilities	Reorganization of existing space		Specific workspace setups to meet functional requirements, additional work spaces	\$200,000	Additional work spaces, additional wicket	\$200,000	\$400,000
Totals		\$70,000		\$555,000		\$455,000	\$1,080,000

The Capital investment that is being requested will ensure that the tools and technology that are required for successful operation of a Customer Contact Centre are in place. This investment will allow for continuous development of our services and will help to align our services with our customers' expectations. Technology costs anticipate leveraging existing technology applications to extend customer service functions. The costs for these systems were provided by our Information Technology department and reflect information from our vendors as well as other municipalities.

Annual Operating Costs

IT Operations			Access Operations			Totals
Communications Infrastructure	\$50,000	Licensing (2016) Annual Maintenance Fee	New FTE	\$80,000	Position to manage Corporate Customer Knowledge	
CRM Maintenance (2018+)	\$75,000	Annual Maintenance Fee	Contracts	\$30,000	Additional resources to define and set processes	
			Equipment	\$10,000	Headsets, office supplies	
			Minor Capital	\$10,000	Peripherals, message boards, equipment replacement	
Totals	\$125,000			\$130,000		\$255,000

Anticipated impact to the annual operating budget once full implementation of the contact centre has been achieved will be approximately **\$255,000/yr.** This does not include the transfer of existing FTE complement and associated budget, which will be net neutral.

2016 request for funds (included in overall Financial Implications)

Operating Funds for 2016 will be required to support in depth planning for the start up of the contact centre and development of the knowledge base for the Customer Service Plan. The majority of funds will be allocated to support the reorganization of staff to form the Customer service branch as an operational unit, process mapping, developing the knowledge management system, the development and delivery of training and equipment and services that will be defined through the implementation plan.

Staffing - For 2016 a permanent position will be required to focus on the development of the Knowledge Management system. Consideration for this position is being requested in the 2016 budget.

Operating Budget Request Access Barrie	2016
1 new position in 2016, to support Knowledge Base development (9 months)	\$ 60,418
Minor Capital	\$10,000
Equipment	\$10,000
Contracts to define and set process	\$30,000
Operating Budget Request IT	
Communications Infrastructure Licensing Annual Maintenance Fee	\$50,000
Capital Budget Request IT	
Consultant to support development of RFP	\$50,000
Total	
	\$210,418

The \$210,418 for 2016 is included in current intake forms as part of the 2016 Budget and Business Plan.

11. Return on Investment

The provision of customer service is a core service of the municipality. Up until now, very diverse types of services have been delivered by individual departments in different and unique ways. As a result of these differences a consistent tracking of similar types of statistics and metrics has not been done. This resulting lack of data has made quantifying the potential costs savings and benefits challenging in a true business format.

The following areas represent where significant gains in efficiencies will result in better allocation of resources and where time, effort and costs can be saved for the customer and staff.

- The right resources in the right place at the right time can more easily respond to peak periods.
- Embedded quality service standards can ensure customer satisfaction.
- Consistency of messaging can reduce the possibility of misinformation to the customer and the need for the customer to make multiple requests for the same information.
- Ease of use of a Contact Centre will increase usage decreasing demand on departments. This will allow technical staff to have increased technical capacity rather than the repetitive and time consuming back and forth with customers on a daily basis.
- When customer service technology is integrated with other corporate technology, there is a significant reduction in rework.
- Cost avoidance may be possible as increased efficiency can balance off growth related increases in requests for service.

- A request or inquiry is only handled once. This can increase customer satisfaction as customers do not have to go between several departments or areas for service.
- Contact Centre staff will be specifically trained and dedicated to customer service, leading to the customer feeling supported. This enhances confidence in the Corporation when dealing with the City of Barrie.
- When all calls and interactions are tracked, no customer request is lost. This will increase customer satisfaction and confidence.
- Statistics that will be available will inform future planning including, service delivery enhancements, infrastructure repairs/replacements, budget requests, risk management and legal matters.

The main focus of the contact centre plan is “The Customer”. Providing customers with clear, easy access to information and services will reduce confusion, improve the efficiency and quality for the customer to receive timely, responsive, consistent, easy service that is convenient to them. Online opportunities such as customer portals will also be developed to allow customers to complete more services online. This will lead to increased customer satisfaction. Customer satisfaction has been shown to increase the overall trust and support for the entire organization. The time to answer a query will be reduced due to the availability of information and knowledge. When customer information is retrievable and processes are defined clearly, the likelihood of multiple calls or multiple transfers of a customer is greatly reduced.

All calls are tracked through the CRM and requests for service and inquiries are recorded for action and follow-up in the departments. No customer request will be lost, as every service will be monitored and analyzed. This analysis of calls will provide information that will assist in determining needed communications for programs, services and events. Analysis will also provide information to Managers and senior leadership for future planning including, service delivery enhancements, infrastructure repairs or replacements and budget requests.

Reporting will be available to assess and analyze service requests and service delivery by all input fields such as; street, problem code, received date and completion. Reporting is also available for risk management and for Legal Services to utilized in claims and dispute resolution.

12. Alternatives

For the development of the business case, other options were explored to determine the best viable option for the city to move towards a strong customer service presence. These options have been studied for what they could or could not accomplish for the city and it’s residents, and in comparison to the customer contact centre would not be successful.

1. Build the Knowledge system but do not integrate a Customer Management Solution.

This option will limit the value of consolidating Customer Service. Without the tracking that a Customer Management program offers, very limited data would be gathered to support future business decisions. There will be no historical tracking of interactions resulting in duplication of work, as multiple similar transactions get actioned independently.

2. Implement tracking software without a Knowledge system.

This option would see no benefit to the customer, as access to information would be even further removed for the staff that is attempting to serve the customer. This will result in no gains in accuracy, consistency or timeliness. Calls will increase, as calls come into the centre they will still need to be transferred to the departments to manage. This would keep creating more work for the departments.

3. Consolidate Service with no supporting Knowledge system or Customer Management system.

This option would see no gains in Customer Service short or long term through consolidation. Calls would increase but would just add an additional layer of process that adds no value to the customer or the Corporation.

4. Maintain the current decentralized model for Customer Service.

This option would result in increased costs as individual departments would struggle to meet the increasing needs of an increasing population with increased expectations.

13. Change Management and Communications

The Customer Contact Centre is a major change initiative. Like many other organizations, the City realizes that change must be considered as a process, not an event. Consequently, change must be managed in an organized manner.

Change Management emphasizes the “people side” of change. The implementation of a formalized structured Change Management process will enable this project to quickly, and effectively, implement change, and to achieve the required/desired outcomes.

A Change Management Plan for the project will be developed as part of the implementation schedule to;

- Ensure quality outcomes and deliverables that are on time and on budget;
- Ensure proactive communications to customers and staff to minimize and mitigate any negative impacts that may result;
- Support employees affected by the implementation of the Customer Contact Centre and provide specific training that will assist employees in understanding the change with a view towards a shared objective to improve customer service;
- Ensure that employees have the answers and leadership they need throughout the project to address and reduce feelings of anxiety and resistance to change as well as address the overall corporate culture changes that will be occurring.

A full communication plan will be developed in conjunction with the communications and marketing branch to ensure residents are informed about the new and improved options for customer service and all that will be offered as part of the improvements initiatives. The communications plan will include all customer service channels - in person, by phone, email and online.

14. Conclusion

Creating a centralized model for customer service in the City of Barrie will effectively move the corporation closer to fulfilling the mandate to create a customer centred organization. Through the implementation of the Customer Contact Centre in phases starting in Q3/Q4 of 2016, the centre will constantly evolve over the next 3 - 5 years to be a support to the overall organization and its customers.

Leadership and a shared organizational commitment will be essential for success. The Executive Management Team has a committed mission to customer service that will be realized throughout the Corporation. Dedicated resources will be needed to implement the initiatives that are part of this plan. Successful implementation will require a dedicated time commitment from staff and departments to develop new processes to support the new service delivery model.

Effectiveness cannot be achieved solely through centralization. In order for integrated service delivery to be successful, extensive business process review must continue. The goal will be to reduce turn-around time and improve responsiveness. Opportunities for improvements will be sought so that the front-line

customer service staff can provide good service with clearly defined processes and workflows. It is anticipated that there will be continued development and introduction of new services and functionality as new systems and processes become available. Once the major phases have been completed we will look to extend into service partnerships with similar organizations such as Service Ontario, Barrie Public Library, and Barrie Police Services.

Access Barrie will develop, lead and implement the Customer Contact Centre, but all departments will have the mandate to make customer service a priority. Access Barrie will work with departments to define and document their customer service processes so that a consistency of delivery can be achieved across services and channels of service resulting in an improved customer experience.

The Customer Contact Centre Plan is solidly put together but can be flexible to leverage new and changing circumstances as they present themselves. The Customer Service Plan will continue to be a guiding document for the overall development of a clear culture of customer service across the organization, but the Customer Contact Centre is an important pillar of the overall plan. Realizing this new service delivery method will help to instill a strong culture of customer service and continuous improvement across the Corporation of the City of Barrie.