

# **Putting Mississauga Customers First**

## Building Better Experiences

**FINAL REPORT - October 17, 2017**



# Table of contents

1. Executive Summary
2. Background
3. Project Overview
4. Research and Analysis
5. Mandate and Guiding Principles
6. Initiatives
7. Customer Service Standards
8. Next Steps
9. Acknowledgments

Appendix: Customer Service Strategy – Initiative Detail

# **1. Executive Summary**

# Executive Summary

## The Customer Service Strategy Project

The purpose of the project was to develop a research-based corporate Customer Service Strategy based on a shared service model.

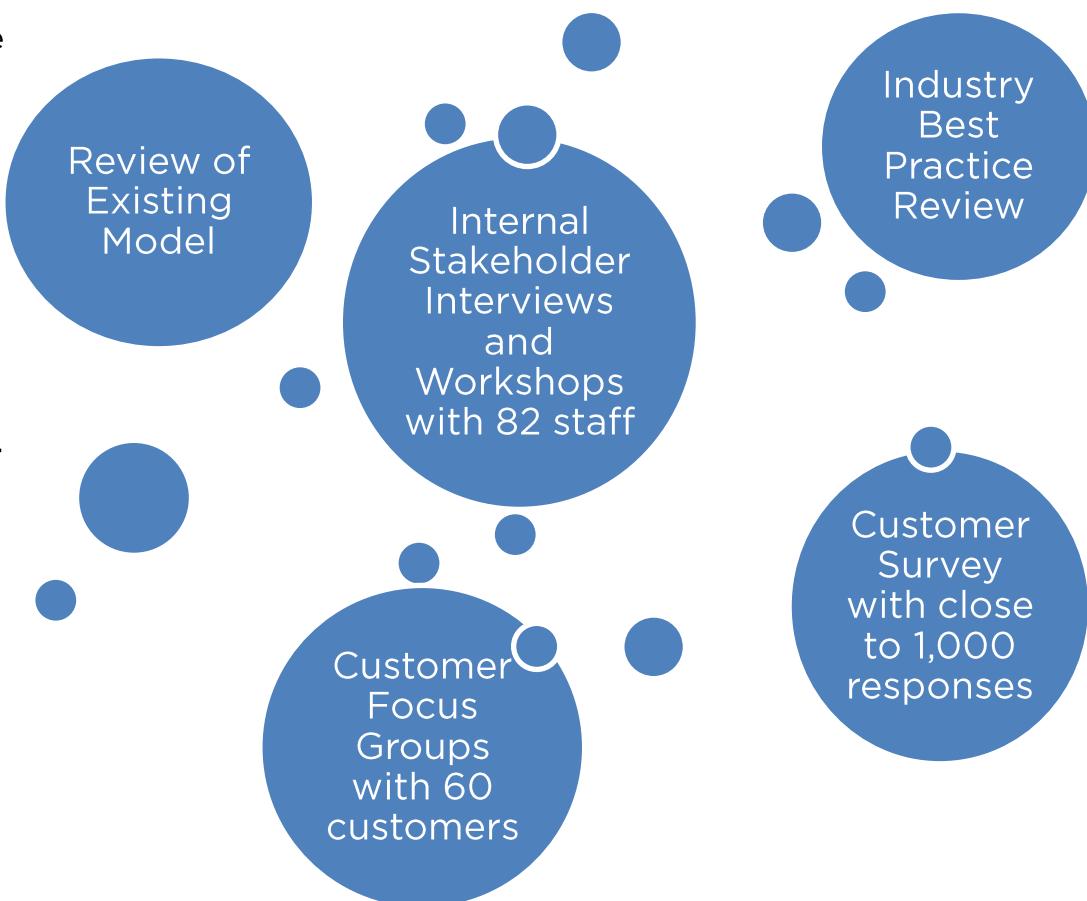
The objective was to create better interactions between the City and its customers in the most effective way possible.

As part of the project, research was done to identify the “as-is” state of customer service, perceptions of customers and the leading practices in citizen service delivery.

Key outcomes of the research indicated that customers are generally satisfied with the service they receive, however there is room for improvement in the areas of:

- Follow-up
- Consistent information
- Ease of use
- Consistent training
- Digital readiness

## Stakeholder Engagement & Industry Research



# Executive Summary

## Customer service is rapidly changing

The face of customer service is very different now than it was at the time the original Customer Service Strategy was completed in 2004. Customer expectations have continuously risen and they are demanding 24/7 service, instant resolution, accuracy, ability to self-serve and consistency across all channels.

Every interaction that a customer has with the City of Mississauga, whether via phone, online or in person is an opportunity to provide excellent customer service. The City has high volumes of customer interaction through the many services it offers. While the standards and method of delivery for the many services provided by the City differ greatly, customers expect a high level of responsiveness and consistency in the experience they receive each time they interact with the City of Mississauga.

Technology is also rapidly changing how organizations deliver customer service. Having easy access to information has educated customers and empowered them to look elsewhere when they do not receive the customer service that they expect.

Imperative to succeeding in the new world of customer service is knowing how to effectively use technology that is constantly changing. Having some form of technology is not enough in the eyes of the customer if it is not being used effectively and if it does not provide the features that customers have come to expect of other organizations.

Customers expect real-time updates and instant information as this is the service they receive from private sector companies in shipping, banking and online shopping. They expect customer service to be easy to access, understand and complete.

# Executive Summary

## Keeping pace with customer expectations

The need to change is being driven by unsatisfied customers. Some of the main reasons customers are unsatisfied are: a lack of consistency in customer experience, limited ability for automated follow-up/follow through and limited online services. In order to simply meet rising customer expectations, we must make customer service a priority at the City of Mississauga.

## What we heard from customers

Comments and feedback gathered from customers point to a requirement for a more consistent customer service culture that needs to be developed beyond front line personnel and ingrained within all operational departments of the City. Customers stated that they think the City should focus on:

- **Follow-up & follow-through:**  
Provide status updates on service requests so that they are able to stay informed. Ideally they would like this in the form of push notifications as their request progresses.
- **Minimize customer effort:**  
They feel that even if the process is complex in the back-end, it should be simple for the customer and the City should be easy to do business with.
- **Enhanced customer service training:**  
Ensure that there is a strong customer service culture throughout all service areas and that all staff receives regular customer service training.
- **First contact resolution:**  
They don't want to have to call the City several times or be transferred to different departments to complete their request.

# Executive Summary

## Implementing the 4-year strategy

The Customer Service Strategy includes 15 initiatives that are designed from an outside-in approach to improve customer service at the City of Mississauga. The initiatives fall under the following key areas for improvement:

1. **Customer Centric**
  - Define Main Customer Types and Their Service Experience Characteristics
  - Develop Service Standards
  - Transform Business Processes to Improve the Customer Experience
2. **Organization and Change**
  - Promote and Recruit for a Customer Service Attitude
  - Introduce City Wide Customer Service Training
3. **Channel Management**
  - Evaluate 311 Interactive Voice Response System (IVR)
  - Improve Directional Signage at City Hall
  - Improve the Welcome Desk at City Hall
  - Consolidate Service Counters
  - Evaluate 311 Services
  - Evaluate Online Services
  - Standardize Measurement, Reporting and Quality Assurance
4. **Improve Technology**
  - Implement a Service Delivery System (Customer Relationship Management and Workflow)
  - Implement a Single Sign On
  - Implement a City Wide Knowledge Base

# Executive Summary

This strategy builds upon the goal of the previous strategy to support the corporate direction of operational excellence by providing streamlined structures and processes. It will drive the corporation to provide quality services in a responsive, convenient, transparent and cost-effective manner to meet customer expectations and provide value for money to residents and customers.

In the short-term (1-2 years) the strategy will review, assess and implement technology improvements to ensure the Corporation has the right customer service infrastructure as a foundation. It will also include reviewing the potential for further consolidation of service counters to the façade and ground floor.

Over the short and medium-term (1-4 years) and on an ongoing basis the strategy will provide direction and guidance to review and enhance customer service processes, training and coordination to ensure that they are efficient, effective and provide a high-quality customer experience.

Customer service management is a cross-functional discipline requiring a high degree of collaboration among departments and staff. To be successful, all departments must have a shared responsibility to deliver a high value customer experience across all channels. This includes consistent information and messaging, and working together to refine the value of each role in delivering end-to-end service.

# Executive Summary

## Conclusion

Residents consistently give high scores to the City of Mississauga on customer service satisfaction. This has been validated through surveys, customer feedback and focus groups; however, there is room for improvement in regards to greater consistency and simplifying the customer experience.

Although customer satisfaction is very high, the environment and expectations continue to shift and the City needs to be proactive to ensure performances does not slip and result in lower customer satisfaction.

This 4-year strategy is focused on delivering three key benefits:

- Enhancing the customer experience
- Making it simpler for employees
- Improving operational efficiency

With many complementary initiatives such as MiVoice – MiWay's online forum for feedback, the redesign of City's web site and investments in new customer service technology already underway, there is growing momentum to build better customer experiences.

The implementation of the initiatives outlined span the next four years, but the customer service journey continues long after these initiatives are implemented. These changes are required to improve customer service and responsiveness of customer service delivery across all departments and service channels at the City of Mississauga.

## 2. Background

## Previous Strategy

The City's first Customer Service Strategy was developed in 2004. The strategy outlined the City of Mississauga's vision for Customer Service, as it related to inquiries management.

The strategy was developed as part of the implementation of a number of initiatives resulting from business planning and was used as an overarching framework for customer service in Mississauga.

The strategy aimed to support the corporate direction of operational excellence by providing streamlined structures and processes.

It led to the completion of a number of corporate projects to improve the efficiency and quality of corporate customer service, including;

- 25 business areas were consolidated between 2007 and 2011 with additional process consolidation (service requests) occurring between 2012 and 2013
- 17 customer service counters were reduced to 10 locations in City Hall
- Launched the Mississauga 3-1-1 Citizen Contact Centre
- Implemented a new customer service request management tool and knowledge base tool

# Recent Successes

Following the initial strategy, several divisional initiatives were implemented across the City to further improve the customer experience, including:

## ePlans

Introduced in 2016, ePlans allows customers to submit development plans and documents electronically. Since launching it has reduced processing times and provided a number of different savings for customers, including approximately \$100,000 in printing costs and 40,000 litres of fuel.

## Lean Program

Lean brings staff and customers together to understand how the work gets done, and how to work smarter, together. For example, by reviewing the process, trees are now replaced more quickly. The time from the initial request to tree in the ground has been reduced by over 25%. Over 2,000 City staff have been trained in Lean practices to date.

## MiWay Customer Ambassadors

In 2016 MiWay launched the MiWay Customer Ambassadors. These are staff that are present at locations where customers are to provide help, education, guidance and answer questions they may have.

## Pingstreet Application & Online Services

In 2015, Mississauga joined Pingstreet – a free mobile app that provides real-time access for citizens to the municipal information they need. The City also offers 68 online services through mississauga.ca. The app and online services help the City focus on enhancing citizen self-service and reaching citizens across multiple channels where, when and how they prefer.

## Facility Bookings

The Recreation Customer Service Centre redesigned the Online Facility Booking Request form which eliminated the need for multiple touchpoints with the customer and promoted online use. By improving the process they reduced the time it takes to complete a booking and improved the overall customer experience.

# Customer Service: Changing Expectations

As the volume of customer interactions has risen sharply, so did their level of expectation. The face of customer service is very different now than it was at the time the original Customer Service Strategy was completed.

4 key factors have transformed customer expectations.

1. **24/7 service:** Customers want to be able to reach you at a time that is convenient to them, often that is outside 'normal' hours of operation.
2. **Increasing expectation of instant resolution:** Customers expect faster responses to their issues and service requests.
3. **Self-service as a preferred option:** Customers are now willing to be part of the process and expecting to track/monitor requests.
4. **Consistent experience across all channels:** Whether in person, online or by phone, customers believe they should be offered the same level of service or experience.

# Risk of Not Meeting Customer Expectations

## First interaction

Each customer has a unique range of expectations that they would be satisfied with. A number of factors can expand and contract this range.

Likewise, an organization has a range of ability to deliver each particular service. These two overlap with each other and the majority of the time an organization should be able to meet customer expectations.

## Complaints or follow-up interactions

When an organization is unable to adequately satisfy the customer at the first point of contact their expectation rises and their tolerance reduced – shrinking their range of expectation for subsequent interactions. It becomes more difficult for an organization to deliver satisfactory service.

To meet an increasingly higher level of expectation requires exponentially more staff time and efforts. It is important to provide efficient and cost effective customer service because it is critical to avoid escalations and meet expectations at the first point of contact.



# Customer Service at the City of Mississauga

With a population of 722,000, Mississauga is the sixth largest city in Canada and the 24th largest in Canada and the United States.

The City provides several services to the community in the areas of Fire and Emergency Services, Roads, Transit, Parks and Forestry, Environment, Libraries, Recreation, Land Development Services, Arts and Culture, Regulatory, Legislative and supporting city services.

These services lead to the City handling over 78 million customer interactions each year with both residents and businesses, of which Mississauga is home to over 86,000.

## A Highlight of 2016 by the Numbers:

- 311 received 264,000 calls
- 70,000 building, plumbing, heating and sign inspections completed
- 6 million library items borrowed
- 166,000 hours of swimming, skating, fitness and other activities delivered
- 25 arenas, 11 community centres and 22 pools

Over 78 Million Customer Interactions Annually Including:



# Making Customer Service a Priority

According to the Institute for Citizen-Centred Service (ICCS), service delivery efficiency is a key differentiator and comparator for cities and municipalities, driving customer satisfaction and economic development.

People have increasing expectations of municipal service delivery and there is a direct correlation between service delivery satisfaction and perception of good government.

Customer service expectations include improved delivery timeliness and issue resolution, and shorter wait times for telephone and in-person services, and easier navigation of online services.  
(ICCS, Citizen's First 7, Dec. 2014)



### **3. Project Overview**

# Service Delivery at the City

The City of Mississauga aspires to provide a high level of value to all of its residents, businesses, tourists and other stakeholder groups, regardless of the nature of their interactions. These customers and stakeholders can become ambassadors and advocates for the City; enhancing the economy and making it a great place to work, live and play.

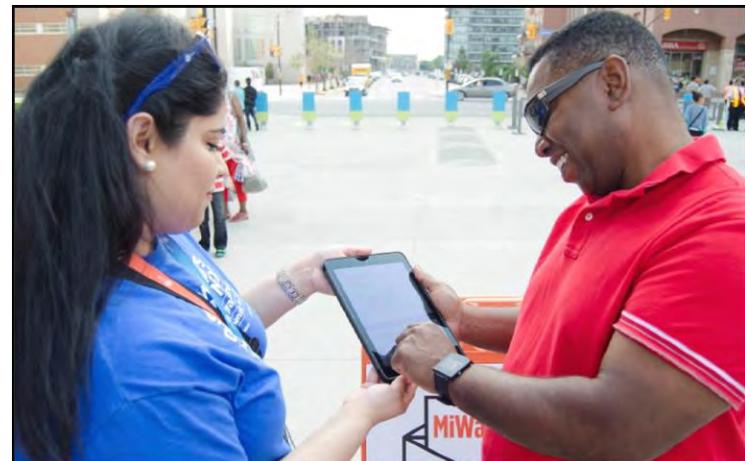
**Customer service delivery at the municipal level is rapidly changing due to three primary factors including:**

- rising citizen expectations for service excellence brought about through interaction with public and private sectors
- government budgetary constraints
- advances in information technology

Customers expect real time updates, the ability to track service requests, consistent customer service and follow up and follow through from the City.

Not all City services can be delivered instantly. Some services rely on working with external partners, have legislative requirements or are weather dependent.

However, managing customer expectations must be a key focus for all service delivery to ensure customers understand the service standard for the service, the status of their request, and any requirements that are necessary for completing the service.



## Project Purpose

The purpose was to develop a research-based corporate customer service strategy that is based on a shared service model. As part of the project the City engaged an external consultant to report on key elements including defining a common customer service vision, a governance model and technology requirements that focus on increasing our capacity to provide more effective online and self-serve options.

## Project Objective

The overall objective of the project was to create better interactions between the City and its residents and customers in the most effective way possible. We want to ensure that we provide a high level of value to all of our residents and customers (regardless of the nature of the interaction) and for them to become ambassadors and advocates for the City of Mississauga.

### Current State Assessment

August 2016



**Internal Stakeholder Engagement**  
August/September 2016



**Customer Insights Research & Analysis**  
October/November 2016



**New Customer Service Strategy**  
January 2018



## 4. Research and Analysis

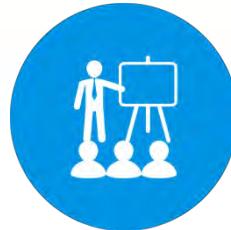


# Overview

As part of the Customer Service Strategy project, background research was done based on stakeholder discovery sessions, citizen consultations, market research, leading practices review and delivery channel reviews. This was done to identify the “as-is” state of customer service at the City, perceptions of citizens and business and the leading practices in citizen service delivery.

- ✓ Internal Stakeholder Interviews and Workshops with 82 staff
- ✓ Review of Existing Model
- ✓ Industry Best Practice Review
- ✓ Customer Survey with close to 1,000 responses
- ✓ Customer Focus Groups with 60 customers

# Internal Stakeholder Interviews and Workshops



## Overview

This phase included a review of current strategic and operational plans, maturity assessments, service delivery organization structures, operations and performance management practices and technology architecture and roadmaps to provide context to the nature of the business conducted by the City.

It also included engaging 82 internal stakeholders through interviews and workshops including front line staff, senior management, City Councillors and the Mayor's Office. This was done to ensure the complexity and unique requirements of each service were captured and taken into account:

### Topics included:

- Opportunities for shared services channel delivery
- Potential future online services and channel shift opportunities to the web
- Customer standards and metrics for monitoring performance

## Lessons Learned:

- The City of Mississauga has experienced and knowledgeable staff.
- Training varies across departments.
- The service request process is not closed-loop; customers are not advised automatically of service request status or completion.
- The City has limited metrics to evaluate customer service delivery in general and particularly for online services.
- Working with Lean to review processes will improve the customer experience and look for operational efficiencies.





# Industry Best Practice Review

## Overview

Benchmarking research was done with municipalities known for their level of maturity and focus on citizen and business-centred service including Vancouver, Brampton, Ottawa and Calgary. Additional insights were used from previous benchmarking done with Boston, Victoria, Winnipeg and Edmonton.

A review of secondary sources such as “Citizens First 7” and “Taking Care of Business 4” which are publications from the Institute for Citizen-Centred Service was also completed.



## Key Trends in Customer Service Delivery

1. **Creation of a service-orientated organization for coordinated service delivery:** includes effort to promote and increase the City's profile.
2. **Shared customer service approach:** engaging service areas through formalized account management and detailed service level agreements.
3. **Public sector customer service governance:** a critical success factor for implementing and sustaining an omni-channel strategy.
4. **Service quality and ongoing process improvement:** key factors in improving customer experience.
5. **Customer Relationship Management (CRM) applications:** a focused investment in a front-end application with integration to other enterprise systems.
6. **Open Data:** accessible datasets can allow for better government efficiency, deeper analytical insights and greater citizen participation.

# Customer Service Survey



## Overview

We conducted an online survey of recent City customers with close to 1,000 responses. We looked at overall satisfaction by service area (web, contact centre or counter), drivers of satisfaction and areas for improvement. The survey found that overall, customers are satisfied with the service they received, however there is room for improvement.

## Lessons Learned

- Those who had to contact the City more than once were less likely to be satisfied.
- Many dissatisfied respondents reported difficulty in getting the outcome they were looking for from counter staff or telephone calls.
- Respondents felt that the service level for a callback is too long.

Results point to a requirement for more consistent customer service, particularly in the areas of:

- Follow-up
- Consistent information
- Simplification of processes that make them easier for customers



# Focus Groups

## Overview

Six focus groups were completed with 60 customers, including residents, the business community and sports and community organizations.

The high level of satisfaction observed in the survey was validated during the focus groups. During these sessions the emphasis was to gather feedback, opinions, insights and suggestions on improving service delivery. Four themes emerged:

- **Follow-up and Follow-through:** A common complaint was the lack of follow-up to requests or enquiries.
- **Minimize Customer Effort (Ease of doing business/interacting with the City):** Many feel that City processes are too complicated and designed for the convenience of departments.
- **Enhance Customer Service Culture and Training:** One of the biggest issues customers raised was the inconsistency between the level of knowledge and service provided by staff across the organization.
- **Grow Digital Readiness:** There is interest in doing more online, especially if services could become more efficient.



**Three key areas customer's want the City to focus on improving**

- **18%** want the City to focus on training
- **15%** want the City to focus on improving response time
- **10%** want the City to focus on follow up and follow through



## **5. Mandate and Guiding Principles**

# Mandate

To deliver customer-focused service that supports the City's commitment to continuous improvement, creating satisfying service experiences with each interaction.

**Customer Service Delivery must be:**

- Simple and easy for customers
- Cost-efficient
- Simpler for staff to deliver



# Guiding Principles

- 1. Focus on the Customer**  
Make the customer the center of all channel and customer experience solutions.
- 2. Provide Consistent Service**  
Deliver a consistent customer experience across all City channels and services in order to make it easy to interact with us.
- 3. Implement Service Standards**  
Be responsive and proactive and establish specific delivery standards for all City interactions and services, and communicate them to customers.
- 4. Offer Services Through Preferred Channels**  
Focus on right channeling based on customer preferences and operational efficiencies.
- 5. Embrace a Customer Service Culture**  
Instill a customer service mindset to improve the customer experience for our internal and external customers.
- 6. Collaborate for Success**  
Make it easy for our employees to efficiently serve customers and build relationships by working together.

## **6. Initiatives**

# Initiatives

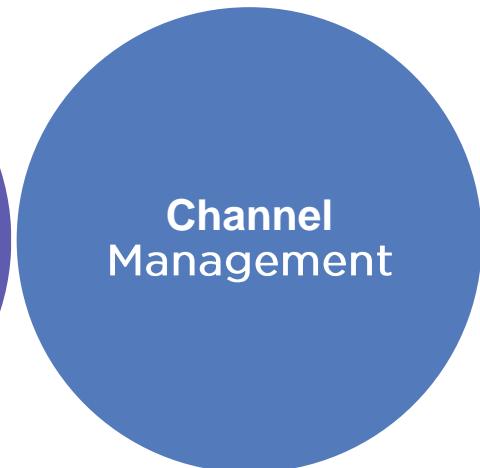
In alignment with the Customer Service Mandate and Guiding Principles, fifteen initiatives have been identified in the following key areas for improvement.



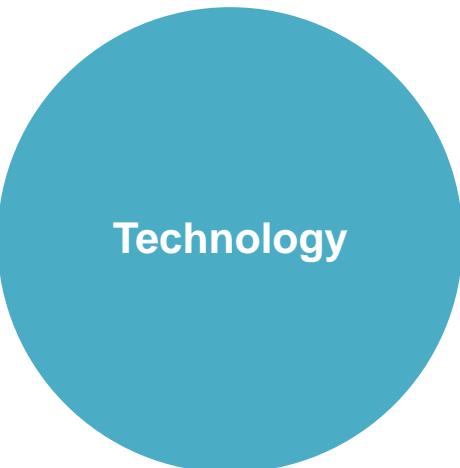
**Customer  
Centric**



**Organization &  
Change**



**Channel  
Management**



**Technology**



*“A customer-centric approach, one that aims to provide the best possible customer experience using the most efficient delivery model, has come to define leading service delivery around the world.” Service Delivery Trend Outlook*

# Customer Centric

## Overview

Recommendations in this category focus on defining the service strategies that drive enhanced customer service and experience.

### 1. Define Main Customer Types and Their Service Experience Characteristics

The City offers a variety of services to its customers. Fundamental to the Customer Service Strategy is the requirement for all service areas to understand the characteristics of key customer types accessing their services. This will allow each service area to tailor their customer experience and will support efficient Lean processes for timely and coordinated outcomes to drive service satisfaction.

It determines the best and “right” channels to engage each customer group and will help define a Channel Management Strategy for the City.

Examples of customer types include homeowners, small businesses, real estate developers, recreational associations etc.



# Customer Centric

## 2. Develop Service Standards

Service standards, often in the form of a charter, set out the City's commitment to its customers and define what they can expect when interacting with the City regardless of the channel they choose. It includes service outcomes and establishes an approach where service standards are developed and communicated to customers.

Every organization should have basic expectations for employees to provide good customer service. Customer guidelines define the standards on how we expect staff to behave when interacting with customers and other employees.

These guidelines can also set standards for how customers should interact with City staff. These guidelines should contribute to a corporate wide scorecard for service measurement.

The City offers a wide range of services, some of which are unique and complex. Service standards, including response times and actionable items vary across the service area. Some services require working with external parties, have legislative requirements or are weather dependent. Service standards should not be "one size fits all" and should be customized by the service area and in some cases by service request.

Key to the success of this initiative is working with all service areas to establish service standards, guidelines and policies that define the level of service customers can expect and their participation and validation in developing the Service Promise and Service Charter.

# Customer Centric

## 3. Transform Business Processes to Improve the Customer Experience

There are opportunities to improve key citizen facing processes to ensure that they focus on the customer perspective and the customer experience. This initiative supports embedding the customer experience as a primary factor to consider when developing new and reviewing existing business processes to deliver enhanced and efficient services.

To provide a consistent experience, accurate information and predictable outcomes, it is essential that service delivery processes be accurately documented and understood from the customer's perspective. This information should be readily available to all staff and will include high-level process flows, service standards, ownership and accountabilities.





*Change Management directed towards employee engagement and cultural change from the outset is critical to the adoption of customer-focused service delivery.*

# Organization and Change

## Overview

It is critical that all organizational tools, functions, and structures have a customer centric focus and that support is provided to manage the cultural implications of this transformative change.

### 4. Promote and Recruit for a Customer Service Attitude

The City ranks above the norm among other cities in terms of customer satisfaction based on surveys and focus groups. However, based on the same feedback received, customer service attitudes exhibited by some employees were inconsistent across channels and service areas.

Informed and empowered employees with strong customer service acumen are at the core of any successful service-based organization. This initiative will provide guidance to the development or enhancement of position descriptions and classification to support the customer service approach, including the Customer Service Strategy, Mandate and Guiding Principles.



# Organization and Change

## 5. Introduce City Wide Customer Service Training

This initiative builds on the previous two initiatives, to ensure existing employees also reflect the desired customer service attitude to provide consistent service across departments.

A training program will be developed to reinforce a corporate customer service approach to all new and existing employees.

It will also include the development of customized course materials and the delivery of training to all employees, using a “train the trainer” approach. It is recommended that the course be delivered to new employees as part of their onboarding orientation. It is also recommended that a condensed refresher training course be delivered on a regular basis; for example, every two years.



*Traditional and digital channels must work in unison as part of a 'right channeling' strategy - making the right services available through the right channels.*

# Channel Management

## Overview

High quality execution is critical to success. These recommendations focus on ensuring effective implementation across all primary channels, providing services through the right channels to meet the different communication and channel preferences of our customers.

### 6. Consolidate Service Counters

Consolidating customer facing counters is a common practice in customer service delivery. It is recommended that the City explores options to consolidate counters where possible to improve the customer experience and provide a focal point for customer service counters.

Further consolidation to the façade and ground floor, as well as assessing satellite locations will provide convenient options for customers.

### 7. Improve Directional Signage at City Hall

Based on a review of counter operations there are opportunities to improve the ability for customers to find their way around City Hall using signage and other wayfinding approaches.

### 8. Improve the Welcome Desk at City Hall

The current Welcome Desk is limited to providing general information to customers at City Hall. The tools and training provided to Welcome Desk staff are not the same as that provided to 311 agents, creating differences in the level of service provided to customers. This differs from other municipalities who provide full-service counters.



# Channel Management

## 9. Evaluate 311 Interactive Voice Response System (IVR)

There are opportunities to promote 311 as the single contact number for City services and utilize the IVR to route calls within and across contact centres based on input selections by customers. This will reduce the numbers of calls that are transferred by agents to other centres, or call queues, to improve first contact resolution.

## 10. Evaluate 311 Services

Customers expect quick resolution to their inquiries. To achieve this a review will be completed to expand the service capabilities of 311 to allow for greater first contact resolution and to reduce call escalation from 311 to other service areas.



# Channel Management

## 11. Evaluate Online Services

Once services have been categorized into common service types, they can be evaluated for digitization and conversion to web self-service for citizens. This initiative determines and prioritizes the services that can be digitized and evolved for web self-service.

## 12. Standardize Measurement, Reporting and Quality Assurance

The purpose of this initiative is to identify performance metrics and quality assurance measures to help guide a customer service culture, while promoting continuous improvement of efficiencies and an enhanced customer experience.



# Key Performance Indicators

Reporting and Quality Assurance (QA) are key foundational elements of any corporate process improvement strategy and service transformation, showing the key metrics and reporting processes required to ensure that the service model is effective and delivering on the desired customer and City outcomes.

A number of Key Performance Indicators (KPIs) are recommended to gain insight and understanding of how well we are performing in relation to the strategic goals and objectives.

Strategic level Key Performance Indicators (KPIs) as well as Process and Operational or diagnostic metrics are recommended in the following chart.

Process and Operational Metrics	Key Performance Indicators
<ul style="list-style-type: none"><li>• Contact Volume by Channel</li><li>• Average Handle Time</li><li>• % within Optimum Handle Time by Channel</li><li>• Service Level or Standard</li><li>• Contact Quality (QM Score)</li><li>• % Overdue Case Processes</li><li>• % Case Completion within Standard</li></ul>	<ul style="list-style-type: none"><li>• Client Satisfaction</li><li>• Client Ease of Effort to Outcome</li><li>• Employee Job Satisfaction</li><li>• First Contact Resolution Rate</li><li>• First Level Resolution Rate</li><li>• Average Speed of Response</li><li>• % within Service Standard or Promise</li><li>• Channel Shift</li><li>• Cost per Contact by Channel and Segment</li></ul>

# Online Self Service Priorities

## Overview

The City of Mississauga has developed a number of services that are available online. A comparison of the popular services in other cities (Ottawa, Calgary, Edmonton, Boston, New York, and Chicago) shows that the City is very comparable in terms of enabling high-value online service offerings.

**There are three key areas the City of Mississauga should focus online self-service priorities:**

- Improvements and enhancements to existing online services
- Promotion and visibility of available online services
- Deployment of new services (see recommendation 12)

Services can be defined as online services or transactions:

- An online service is any online process that executes an action (e.g. report a pothole) or provides an outcome (e.g. register into a course) to the user.
- A transaction is an online service that has an exchange of benefit. For example, payment of a parking ticket, renewal of a pet licence. The user provides something in exchange for a result.





*Using the right technology to deliver the right services will not only drive cost efficiencies but will help drive a service-centric culture.*

# Technology

## Overview

To meet the customers rising expectations it is critical that the City has the necessary technology and solutions to provide seamless and effective service delivery across all service areas and channels.

### **13. Implement a Service Delivery System (Customer Relationship Management and Workflow)**

Coordinated service delivery and the tailoring of citizen and business services requires the ability to track service requests as well as provide customers the status of their request through to its completion. For the City to provide these capabilities, application integration and workflow for the management of customer experience for self-service is required.

As processes are transformed for greater efficiency and improved customer experience, Mississauga will require a more integrated solution.

### **14. Implement a Single Sign On**

Implement single sign-on for 311 agents to streamline the login process and improve operational efficiency and convenience.

### **15. Implement a City Wide Knowledge Base**

Information is currently spread across multiple knowledge bases and information repositories within the City of Mississauga. This can result in different information on the same topic or service being provided by each service area and frontline service points. It can also increase costs and effort to maintain multiple sites of information and documentation.

The leading practice in this area now establishes a common infrastructure for information, documents and process operating procedures in order to establish a ‘one version of the truth’ approach to the provision of service information. This approach also allows for greater ease of maintenance of information, documents and processes.

# Technology

Technology is rapidly changing how organizations deliver customer service and customers are more connected now than ever.

Leading call centres have integrated technology that allows them to optimize staff performances on a daily basis while providing a better customer service experience.

The current technology for the City's knowledge base and service request management system has not seen any major upgrades in several years. They do not maximize resources or productivity nor do they meet basic expectations such as reporting, managing customer profiles and push notifications.

The new technology will modernize the service delivery module, meet our City's commitment to excellence in customer service and deliver value for money.

**The use of technology supports effective and efficient customer service operations produces the following benefits:**

- Shorter wait times
- Faster and more comprehensive search
- Improve caller satisfaction
- Reducing “customer effort”
- Reduce staff training time
- Improve enterprise data/contact information
- Provide status updates on service requests
- Support efficient approach to information management
- Simplify the log-in process for 311 agents
- Enable contact centre agents to handle calls quicker

## **7. Customer Service Standards**

# Customer Service Standards

Having the right set of Key Performance Indicators (KPIs) in place is a best practice for service organizations to help understand how well they are performing in relation to their strategic goals and objectives.

Best practice suggests that there are a number of key performance indicators that should matter most to senior management to ensure efficient and cost effective operations. Identifying these KPIs and recommended targets will help drive people, process and technology decisions for service channel performance, customer experience and process efficiency.

Process and operational metrics provide service channel management with day-to-day insight and diagnostics into the operational performance at the self-service, team, agent and overall department level to manage across channels both in near-real time and for short term trend and root-cause analysis on a week-to-week/month-to-month basis.

Fundamental to performance measurement in customer experience and service management is the setting of standards and the communication of them, commonly known as a “Service Promise”, to customers where first contact resolution cannot be achieved or a complex multi-step process is involved. The Service Promise approach must be ingrained in the corporate culture of the City of Mississauga and be visible to customers. It defines the standards that set customer expectations, allows for the reporting of status and performance as well as allow for transparency in the work performed by departments on behalf of citizens and business.

# Example: Our Service Promise (by service)

---

## Our promise to our customers

- When you contact us we will respond to your inquiry and provide you with the right answer.
  - We will explain how we will handle your inquiry and when you will receive the service requested.
  - We will ensure you understand what is expected of you.
  - We encourage feedback on how we deliver services to you.
- 

## We are committed to offering these customer standards.

### We will:

- Make our services accessible.
  - Reduce waiting times.
  - Understand your needs.
  - Be clear and straightforward in our communications.
  - Keep information about services up-to-date, easy to understand and accurate.
  - Treat you with fairness and respect.
  - Protect your personal information and confidentiality.
  - Proactively offer you services based on your needs.
  - Tell you exactly what you need to do and what information we need.
  - Listen to you about ways of improving our services.
- 

### We aim to:

- Respond to voice-mail messages within XX.
  - Acknowledge emails within XX.
  - Respond to emails, faxes and letters within XX.
  - Ensure the website and online facilities are easy to use.
- 

### We ask you to:

- Tell us if your personal circumstances or requirements for a service change.
- Keep any appointment you have with us, or let us know as soon as possible if you can't.
- Treat our staff with courtesy.
- Tell us if you need to communicate with us in a different way.

## **8. Next Steps**

# Next Steps

Customer service management is a cross-functional discipline requiring a high degree of collaboration among departments and staff. To be successful, all departments must have a shared responsibility to collaborate and deliver a well-aligned customer experience across all channels. This includes consistent information and messaging, and working together to refine the value of each role in delivering end-to-end service.

A flexible governance model, supported and championed by Senior Management provides guidance, coordination and when necessary, oversight on initiatives to ensure that interdependencies and relationships among them are managed and quarterbacked to achieve the desired outcomes.

There are several options that should be explored in year three, after completing some of the initiatives. Once the groundwork is in place, such as the technology to provide the City with metrics that can help drive customer service, it is recommended that these governance options are explored.

The options can include a Community of Practice that is meant to address customer delivery services and cross-channel coordination and monitor the implementation and progress of the strategy. This would include Director's from Recreation, Parks and Forestry, Library, Communications, Revenue & MM, Office of the City Clerk, Planning & Building Enforcement, MiWay, Works & Operations

It can include a governance model to address the above stated, in addition to

- Propose an integrated work plan
- Provide strategic guidance to project work
- Ensure integration of solutions and establish linkages to other City initiatives
- Set priorities and allocate resources to initiatives
- Resolve issues and roadblocks at the project or working level

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# **Appendix: Customer Service Strategy - Initiative Detail**

# Table of Contents

1. Implement a Service Delivery System (Customer Relationship Management and Workflow)
2. Implement a Single Sign On
3. Implement a City Wide Knowledge Base
4. Introduce City Wide Customer Service Training
5. Evaluate 311 Interactive Voice Response System (IVR)
6. Promote and Recruit for a Customer Service Attitude
7. Develop Service Standards
8. Improve Directional Signage at City Hall
9. Define Main Customer Types and Their Service Experience Characteristics
10. Transform Business Processes to Improve the Customer Experience
11. Improve the Welcome Desk at City Hall
12. Consolidate Service Counters
13. Evaluate 311 Services
14. Evaluate Online Services
15. Standardize Measurement, Reporting and Quality Assurance

# Introduction

Service transformation such as this is typically an evolutionary journey that should progress in phases. Pressure should not be placed on departments to “jump” to a new customer service model to avoid breaks in service processes and negative impacts to customer satisfaction and overall customer experience. Building strong customer service is a continuous process.

The implementation of the initiatives outlined are spread over four years, but the customer service journey continues long after these initiatives are implemented. These changes are required to improve customer service and responsiveness of customer service delivery across all departments and service channels at the City of Mississauga.



# Implementation

	Year 1	Year 2	Year 3	Year 4
<b>Service Delivery System</b>				
Single Sign On				
Knowledge Base				
City Wide Training				
311 IVR				
Recruitment for Attitude				
Online Services Review				
Develop Service Standards				
Directional Signage at City Hall				
Improve Welcome Desk				
Define Main Customer Types				
Business Processes Review				
Consolidate Service Counters				
Evaluate 311 Services				
Measurement, Reporting & QA				

# Implement a Service Delivery System (Customer Relationship Management and Workflow)

Coordinated and consistent service delivery requires the ability to track requests and provide status updates through to its completion. To provide these capabilities, a customer relationship management (CRM) system is required.

A customer relationship management (CRM) system will provide greater efficiency and improved customer experiences.

The CRM will support: customer accounts; service experience profiles; allow for more complex web self-service; enable service request tracking; status updates and notifications.

## Key Activities:

- Undertake a Fit and Feasibility study to evaluate the current application infrastructure:
  - Evaluate the existing enterprise systems (particularly INFOR) ability to support customer accounts, interaction history, customer experience profiles (series of data fields that indicate key data fields that are used to manage the customer experience based on key attributes) workflows, status enablement, as well as utilize standard integration interfaces for data exchange.
  - Undertake an Opportunity Assessment to establish technology and business options for future process and customer experience requirements.
  - Explore options for procurement of new applications or required services (i.e. hosted vs. hybrid vs. owned).
- Create a roadmap that is linked to the customer service transformation objectives.
- Procure and migrate to the new architecture.

# Implement a Single Sign On

There is no single sign-on in place at 311, MiWay or Recreation contact centres. At 311, agents must log into multiple unique applications (up to 12 systems) upon arrival for their shift, taking up to five minutes at the beginning of their shift before they can handle calls.

A single sign on will simplify the log-in process for 311 agents at the beginning of their shift; eliminating the need to manually enter credentials into each application (up to 12). It would also reduce Help Desk support to manage password resets for multiple applications, supporting agents if they forget their passwords for each of their applications.

## Key Activities:

- Implement web or application-based single sign-on for 311.
- Identify opportunities to extend the technology to other departments.

# Implement a City Wide Knowledge Base

Information is spread across multiple knowledge bases and information repositories within the City. This can result in different information on the same topic or service being provided between departments and frontline service points as well as increased costs to maintain multiple sites of information and documentation.

Leading practice in this area now establishes a common infrastructure for information, documents and process operating procedures in order to establish a one version of the truth approach to the provision service information. This approach also allows for greater ease of maintenance of information, documents and processes.

## Key Activities:

- Evaluate current service knowledge bases and their structures.
  - Review their information architectures, content inventory, taxonomies and maintenance life-cycles
  - Undertake an Opportunity Assessment to establish technology and business options for a common approach to information management
- Create a corporate information strategy and requirements for a common information infrastructure and management approach for information, documents and process support for integrated channel service delivery.
- Procure and migrate to the new infrastructure.
- Establish a Knowledge Management unit to support the coordinated publishing and maintenance of content for service delivery across the main service channels.

# Introduce City Wide Customer Service Training

This initiative will develop a customized training program to reinforce the corporate customer service approach across all existing employees and new hires. Informed and empowered employees with strong customer service acumen are at the core of any successful service-based organization. The program should be delivered on a regular basis to new employees as part of their onboarding orientation. It is also recommended that a condensed refresher training course be delivered on a regular basis; for example, every two years.

## Key Activities:

- Develop and implement a City-wide training program to support the customer service strategy including training modules for leadership (Management Awareness), mid and front-line management (Train-the-Trainer), and employee awareness.

# Evaluate 311 Interactive Voice Response System (IVR)

The City has an Interactive Voice Response (IVR) system that is used for call routing within each of the contact centres and to the Region of Peel.

There are three distinct IVRs, with limited routing available from one centre to the other. Messaging is used for call avoidance during major weather events such as snow or ice storms, or seasonal business activities such as property tax assessment mail-outs.

There are opportunities to promote 311 as the single contact number for City services and utilize the IVR to route calls within and across contact centres based on input selections by customers. This will reduce the numbers of calls that are transferred by agents to other centres, or call queues, to improve first contact resolution.

## Key Activities:

- Develop an update IVR design based on the following inputs:
  - Identify the top services and any related queue routings within 311
  - Identify the top call transfers to other centres or call areas. Identify routings by call queue to reduce the need to transfer callers at the destination contact centre.
  - Identify the top information calls that may be replaced by self-service messaging mailboxes
- Identify opportunities to include additional call routings in the IVR design to provide an enterprise-wide view to the customer.
- Develop an “after hours” IVR that takes into account closed contact centres hours, and provides information messaging, while including the ability to route emergency calls to after-hours agents.
- Validate the IVR designs with service areas.
- Modify the design based on input and feedback received.

# Promote and Recruit for a Customer Service Attitude

The City ranks well in customer satisfaction, based on surveys and focus groups. However, based on the same feedback received, customer service attitudes exhibited by some employees are inconsistent across departments.

This initiative will provide guidance to the development or enhancement of position descriptions and classification to support the customer service approach, including the Customer Service Strategy, Mandate and Guiding Principles. There are many benefits to this including increased percentage of top-box (very satisfied) customer satisfaction and moving bottom quartile detractors into neutral or positive customer satisfaction range.

## Key Activities:

- Identify the desired customer service behaviors, attitudes and characteristics.
- Develop recruitment strategy that targets candidates that match the Customer Service Recruitment Profile.
- Work with HR to ensure that desired customer service behaviors, attitudes and characteristics are reflected in the recruitment strategy.
- Work with HR to ensure Success Factors project includes making customer service a core competency requirement in the PMP.
- Review, validate and revise job descriptions and classifications to include characteristics of the Customer Service Recruitment Profile.
- Define key attributes of customer service acumen to be included in updated position descriptions. Sample attribute include:
  - Creating and maximizing memorable “Moments of Truth” experiences
  - Creating a positive first impression
  - Recover from difficult customer interactions and create a positive customer experience

# Develop Service Standards

Develop service standards in the form of a charter that sets policy for customer expectations for service delivery outcomes and establishes an approach where service standards are developed and communicated for service outcomes. A Customer Charter not only enhances the focus on customer service internally and externally but it also increase the transparency of service delivery.

Every organization should have basic expectations for employees to provide good customer service. Customer guidelines define the standards on how we expect staff to behave when interacting with customers and other employees. These guidelines can also set standards of how customers should interact with City staff. These guidelines should contribute to a corporate wide scorecard for service measurement.

## Key Activities:

- Work with the service areas to update and establish customer service guidelines and polices that define the level of service customers can expect.
- Include the following framework elements:
  - The service standard for every service, including hand-offs and transfers between departments
  - Special departmental service commitments
  - Identify the key customer interactions and notifications as services are delivered. This includes a policy of service status reporting/updating at key milestones. For example, ensure that all customers receive a status notification when service requests are received
- Validate and socialize the Service Promise across City stakeholders.
- Share and make available the Charter with the public.

# Improve Directional Signage at City Hall

Based on a review of counter operations there are opportunities to improve the directional signage at City Hall, and address the following issues:

- Direction finding can be confusing due to the architecture of City Hall; the elevators on the façade building and the tower elevators do not stop on all floors.
- Signage at elevator banks is very long and possibly too small for the visually impaired customers.
- Planning and Building counters are difficult to find for customers.
- Compliance and licensing enforcement signage could be expanded to include the full range of services provided by the Bylaw Enforcement and Compliance Office – e.g. Charity Gaming.

## Key Activities:

- Work with F & PM to ensure that the Ground Floor Modernization project includes improved wayfinding at City Hall to:
  - Identify options to enhance signage and wayfinding at City Hall
  - Identify options to better guide customers to key service counters at City Hall (e.g. information counter, Office of the City Clerk, Planning and Building)
- Identify available signage and wayfinding resources; resources could be in-house staff, and external vendors.
- Obtain approval from City for design and implementation – validate and socialize.

# Define Main Customer Types and Their Service Experience Characteristics

The City offers a variety of services to citizens, businesses and organizations. Fundamental to the Customer Service Strategy is the requirement for departments to understand the characteristics of the major customer types accessing their services. This allows service areas to tailor the customer experience and Lean processes for timely and coordinated outcomes. Examples of customer types include homeowners, small businesses, real estate developers and recreational associations.

This initiative helps service areas provide a detailed definition of the desired service experience by their main customer types. It determines the best and “right” channels to engage these customers and helps define a Channel Management Strategy for the City.

## Key Activities:

- Review City and service area services to identify main customer types.
- Map complete service life-cycle for each customer type that includes:
  - Key persona profiles
  - Main service area services they access or seek
  - Preferred service channels
  - Special service experience required or service standards/expectations.
- Develop a tiered channel management approach to city services that promotes online self-service and how assisted and specialized services support customers to achieving their service outcomes.
- Establish customer service guidelines and policies for each customer type that defines the level of service customers can expect and help to ensure consistent and fair treatment for all.

# Transform Business Processes to Improve the Customer Experience

There are opportunities for the City to improve key citizen facing processes to ensure that they focus on the customer perspective and experience. This initiative supports the integration of customer experience with business processes in order to deliver enhanced and efficient services.

In order to provide a consistent experience, accurate information and predictable outcomes, it is essential that service delivery processes be accurately documented and understood from the customer's perspective. This information should be readily available to all staff and will include high-level process flows, service standards, ownership and accountabilities.

## Key Activities:

- Create a high-level service inventory for the City that identifies service owners, customer groups, outcomes, and processes.
- Develop process maps for services and apply journey mapping techniques to ensure that processes are efficient, effective and are designed from the customer's perspective.
- Review departmental processes for customer experience and process improvement opportunities:
  - Analyze service inventory for common process types across services
  - Develop standard templates for common process types
  - Design, simplify and standardize operational processes against standard templates
  - Prioritize service processes for digitization. Examples include submittable PDF and webforms, epayment, digital signatures, electronic document storage, status and issuance. Digitized processes can then be considered for automation within applications and as an enabler to develop capabilities to support online services.

# Improve Welcome Desk at City Hall

The current Welcome Desk is limited to providing general information to customers at City Hall. The tools and training provided to Welcome Desk staff is not the same as that provided to 311 agents, creating differences in the level of service provided to customers. This differs from other municipalities who provide full-service “311 type” counters.

## Key Activities:

- Train staff leveraging existing 311 training materials, focusing on information calls.
- Ensure that staff at this counter have access to the technology required to service customers.

# Consolidate Service Counters

There are many service counters, delivering a wide variety of services, located across multiple locations within City Hall and across the City. Within City Hall, counters are located on multiple floors and areas of the building.

Some level of integration of these counters is warranted to provide a focal point for general counter services and reduce the amount “walking about” for citizens to achieve service outcomes.

## Key Activities:

- Working with City staff, or external vendor, to perform a feasibility study for consolidating customer service counters.
- This should include a cost estimate for completing the consolidations, relocations and build-out of the proposed space.
- Obtain approval from City for design and implementation – validate and socialize.

# Evaluate 311 Services

311 receives general calls directed to the City, and calls directed to them by Departments to handle specific call types on their behalf. For calls handled by 311, agents will either manage the call to completion or create a service request for the department.

This initiative is about evaluating and identifying opportunities to expand the scope of services at 311. This can include handling the current call types in different ways, or in taking on additional call types on behalf of the departments. The ultimate goal is to reduce the number of call transfers to the departments and increase first call resolution for customers.

## Key Activities:

- Complete a thorough review of all call types handled by 311.
- Analyze core information and processes associated with the call types with the objective of increasing first contact resolution.
- Revise ticketing processes and escalation procedures to departments.
- Identify additional non-complex call types to be handled by 311. The criteria to select call types would remain unchanged; non-complex calls with call handle time of less than the specified number of minutes.
- For each changed call type, or new call type:
  - Refine or develop call handling procedures, knowledge base content and call monitoring quality assurance guidelines.
  - Identify updates required to Infor to implement revised or new call types; including identifying any new service request types and related service levels, routings and workflows.

# Evaluate Online Services

Once services have been identified into common service types, they can be evaluated for digitization and conversion to web self-service processes that can be provided to citizens. This initiative determines and prioritizes the services that can be digitized and evolved for web self-service.

## Key Activities:

- Identify potential services that are not provided online, and identify related volumes by channel (in-person, telephone).
  - Review potential services to identify if the process, and related policies, can be automated with an on-line service.
  - Identify changes to processes and policies that are needed to enable the end to end process online; for example, remove physical signature requirements from forms
  - Identify if there are customer expectations for offering the service online.
- Prioritize service processes and clusters for self-service from the service inventory.
- Develop business and technical requirements, and identify fit with current city online services technologies.
- Develop an implementation plan and approaches for online assistance that can include chat and co-browsing possibilities.

# Factors for Evaluating Potential Online Services

- Identify potential services that are not provided online, and identify related volumes by channel.
- Identify services that are not regularly revised or have the potential to be decommissioned.
- Identify changes to processes and policies that are needed to enable the end to end process online; for example, remove physical signature requirements from forms.
- Identify if there are customer expectations for offering the service online. For example:
  - Does offering the service online simplify the customer experience by removing the need to phone or visit in person during workday hours?
  - Are there customer expectations for this service to be online based on their experiences with other municipalities, or with other industries?
- Develop business and technical requirements and identify fit with current city online service technologies.
- Establish a business case for development and implementation; including implementation cost, and channel shift estimate.
  - The benefit estimates must take into account both the quantitative and qualitative benefits.

For example, the quantitative benefits will include the net cost savings in shifting transactions from in-person and telephone channels to a lower cost channel. Qualitative benefits include meeting customer expectations for providing services online, and helping to make services available 24/7; outside of the City's contact centre and in-person hours of operation.
- Develop the implementation plan, including the approaches for online assistance to users.
- It is important to consider the priority given to listing and displaying the service online. Municipalities often highlight on their website the new services offered, as well as displaying a listing of the most popular online service.

# Standardize Measurement, Reporting and Quality Assurance

City departments do not currently measure key customer measures, including performance indicators and quality assurance results. The purpose of this initiative is to identify performance metrics and quality assurance measures to help guide a customer service culture, while motivating continuous improvement of efficiencies and customer experience.

Reporting and Quality Assurance (QA) are a key foundational element of any corporate process improvement strategy and service transformation, showing the key metrics and reporting processes required to ensure that the service model is effective and is delivering on the desired customer and City outcomes. Key performance indicators and reporting are established to provide a full picture of service activity and business events, providing management with consistent, timely and accurate information on operational performance across departments and service channels

## Key Activities:

- Define reporting requirements that will be used to drive continuous improvement and operational excellence in a municipal government setting.
- Develop corporate and departmental customer service scorecards to promote transparency and accountability of customer service delivery.
- Establish a consistent approach to quality assurance across delivery channels.
- Establish corporate wide and department scorecard reporting to encourage the Mississauga customer service culture.
- Develop a public facing dashboard with specific KPI's that are of interest to customers for better transparency.

