THE CORPORATION OF THE TOWN OF GEORGINA

REPORT NO. CAO-2020-0013

FOR THE CONSIDERATION OF
COUNCIL
October 21, 2020

SUBJECT: CUSTOMER SERVICE STRATEGY

1. RECOMMENDATION:

1. That Council receive Report No. CAO-2020-0013 prepared by the Office of the CAO dated, October 21, 2020 respecting the proposed Town of Georgina Customer Service Strategy.

2. That Council endorse Attachment 1 to Report No. CAO-2020-0013 as the Town's Customer Service Strategy.

3. That staff report to Council annually on the progress of the strategy implementation.

4. That any budgetary requirements associated with the proposed Customer Service Strategy form part of the annual budget approval process.

2. PURPOSE:

The purpose of this report is to seek Council endorsement of a Customer Service Strategy for the Town of Georgina.

3. BACKGROUND:

The Customer Service Strategy is a key action in the Corporate Strategic Plan

On May 29, 2019 Council endorsed the 2019-2023 Corporate Strategic Plan. One of the actions included in the plan is to "Create a Customer Service Strategy" under the "Deliver Exceptional Service" pillar. The development of the Customer Service Strategy was led through the Office of the CAO and guided by a cross-departmental project team.

Significant public and staff engagement shaped the direction of the strategy

In the summer of 2019, a survey was conducted to gather feedback from residents, businesses and visitors on how the Town could improve customer service. The Town received 865 responses that defined the focus of the strategy. The survey

identified four qualities that customers believe are the most important when receiving service:

- Solutions Oriented
- Timely
- Easy to Access
- Professional

In October and November of 2019, the project team conducted interviews and workshops with all staff to gather input on how to best address the feedback from the survey.

A large number of our customers prefer to access Town services online and via mobile devices

Nearly 40 per cent of the survey respondents rated website/online as their top preferred method for receiving services. It is assumed that this number is now higher given the pandemic situation.

Further, as outlined below, customers are accessing the Town website through mobile phones more than any other channel. Based on data analytics, website visitors accessed georgina.ca in the following manner in 2019:
- Mobile phone: 52.5% visits (137,331 visits)
- Desktop computer 37.6% visits (98,468 visits)
- Tablet: 9.9% visits (25,903 visits)

Research shows online services provide enhanced customer convenience and cost efficiency

A 2015 research study conducted by Deloitte, titled Digital Government Transformation, indicates it is significantly more cost effective to conduct business through a digitized online channel as outlined in the table below:

Channel	Cost per transaction (CAD)
Face-to-face	$16.06
Telephone	$6.27
Postal	$12.15
Online	$0.38

The Deloitte study also highlighted other citizen benefits including time-savings from reduced travel and waiting, and avoided out-of-pocket transport and postage costs.

4. ANALYSIS:

Customer service extends well beyond the front counter

Customer service is the sum of the entire journey of our customer. It includes every touchpoint that our customers have with the Town – from interactions with frontline staff, to the ease of navigating the website, to the simplicity of applying for a permit, etc. As a result, the strategy recognizes that great customer service is everyone's responsibility. Every member of staff, in every division, has an important role to play.

The Strategy is designed to deliver tangible improvements

The Customer Service Strategy is designed to deliver 15 specific initiatives over the next 3 years and is structured in the following manner:

- Guiding principles
- Quality commitments
- 4 Pillars
- 8 Objectives
- 15 Initiatives

A multi-year implementation plan has been prepared to serve as a roadmap for delivering the initiatives and results.

### Progress is already underway on a number of initiatives

Staff are currently working to advance some of the initiatives in the strategy including the following:

- Municipal modernization review in collaboration with our third-party consultant AtFocus, which involves:
  - Streamlining 15 customer-facing processes
  - Exploring integration opportunities for building and development approvals
  - Exploring integration opportunities for festival and special event approvals
  - Automating various processes and forms
  - Reviewing the telephone system (completed)
  - Submission of a business case through the 2021 budget process to replace the telephone system

- Expansion of online services, which involves:
  - Creating an online self-serve One-Stop-Shop web page
  - Expanding online payment options
  - Implementing electronic signature capabilities
  - Implementing a Zoom telework pilot for customer service agents

- o Moving parking passes and burn permits online (completed)
- o Transitioning economic development grant program online (complete)
- o Submission of a business case through the 2021 budget process to introduce website enhancements along with a mobile app to improve customer experience and convenience.

Implementation of a virtual One-Stop-Shop for customers will increase online self-serve capabilities

As indicated above, staff are developing a centralized web page for online services. This web page will be initially launched by the end of 2020 and continue to undergo enhancements in a phased approach through 2021. The new page will have the added benefit of supporting business continuity and contactless service in response to the pandemic. The image provided below is a draft design of the new web page.
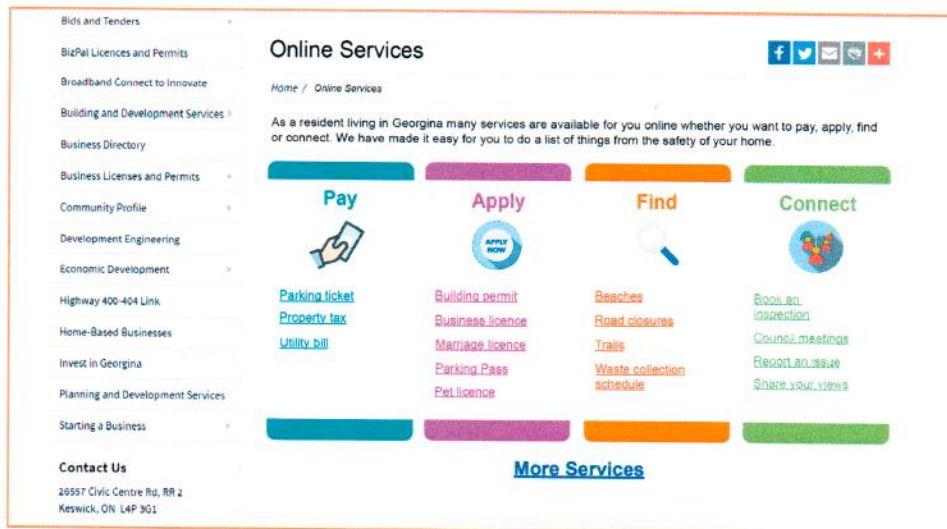
5. RELATIONSHIP TO STRATEGIC PLAN:

This report serves to deliver a key action in the 2019-2023 Corporate Strategic Plan: Create a Customer Service Strategy.

6. FINANCIAL AND BUDGETARY IMPACT:

The Customer Service Strategy will be implemented through a combination of departmental operating budgets and capital projects to be put forward for Council consideration through the annual budget process. Grant funding opportunities (e.g. Intake 2 of the municipal modernization funding program) will be leveraged where appropriate.

7. PUBLIC CONSULTATION AND NOTICE REQUIREMENTS:

As outlined in the background, a customer service survey was conducted in the summer of 2019 and received 865 responses.

8. CONCLUSION:

Through a significant amount of public and staff engagement, and best practice research, staff developed the Customer Service Strategy (attachment 1), a key deliverable in the 2019-2023 Corporate Strategic Plan. The action-oriented strategy will deliver 15 initiatives over the next 3 years and recognizes that customer service extends well beyond the front counter and includes all touchpoints that customers have with the Town. Progress is already underway on a number of initiatives, including creating a virtual One-Stop-Shop web page for online services. The Customer Service Strategy will require strategic investments, to be considered through the annual budget process. Based on the above analysis, it is requested that Council adopt the recommendations as set out in section 1 of this report.

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Attachment 1 – Town of Georgina Customer Service Strategy

Customer Service Strategy
2020-2023

GEORGINA

GUIDING PRINCIPLES

- Our focus is the customer
- Our services are simple, accessible and easy to understand
- We offer our customers various service options
- Our staff are knowledgeable and skilled in delivering exceptional service
- We strive to continually improve our services and measure our performance
- We leverage new and existing technology to improve service delivery

QUALITY COMMITMENTS

- Solution oriented
- Timely
- Easy to access
- Professional

Create a culture
centred on the customer

Deliver a positive and consistent customer experience

Build trust and credibility with our customers

- Establish customer experience implementation team
- Develop customer service standards
- Create a customer service policy
- Leverage future recognition program

Empower staff
to deliver customer service excellence

Ensure staff have the appropriate knowledge and skills

Provide staff with efficient tools and resources

- Create and maintain a centralized knowledge base
- Enhance cross-departmental communication
- Develop and deliver customer service training programs
- Develop online customer service toolbox for staff

Continuously improve
the way we serve our customers

Proactively respond to our customers changing needs

Leverage opportunities to enhance efficiencies

- Establish customer service performance measures
- Develop customer experience feedback program
- Improve customer service processes on a regular basis

Leverage technology
to improve customer convenience

Modernize and automate services

Leverage data analytics to drive improvements

- Expand online self-serve capabilities for customers
- Utilize new and enhance existing technology systems
- Implement a CRM tool and a new phone system
- Automate data analytics and reporting

2020-2023 Implementation Roadmap

ID	Task	2020				2021				2022				2023			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1	**Create a culture centred on the customer**																
1.1	Establish customer experience implementation team																
1.2	Develop customer service standards																
1.3	Create a customer service policy																
1.4	Leverage future recognition program																
2	**Empower staff to deliver customer service excellence**																
2.1	Create and maintain a centralized knowledge base																
2.2	Enhance cross-departmental communication																
2.3	Develop and deliver customer service training programs																
2.4	Develop online customer service toolbox for staff																
3	**Continuously improve the way we serve our customers**																
3.1	Establish customer service performance measures																
3.2	Develop customer experience feedback program																
3.3	Improve customer service processes on a regular basis																
4	**Leverage technology to improve customer convenience**																
4.1	Expand online self-serve capabilities for customers																
4.2	Utilize new and enhance existing technology systems																
4.3	Implement a CRM tool and a new phone system																
4.4	Automate data analytics and reporting																