

Customer Service Review

The City of Cambridge

Draft v1.0

January 2023

DRAFT FOR DISCUSSION

PRIVATE AND CONFIDENTIAL

CONTENTS

DISCLAIMER

The basis of this report is from documentation, data, on-site shadowing sessions, interviews, survey data from residents and peer analysis.

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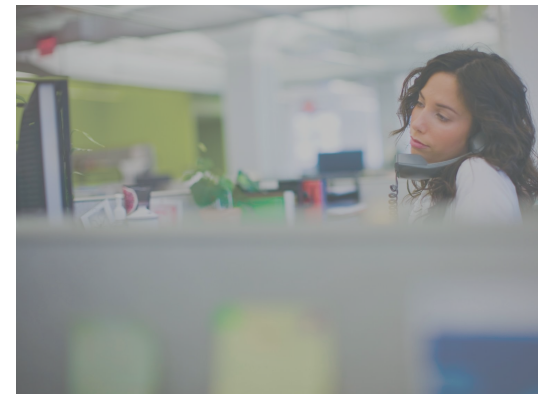
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/ CONTEXT

The City Is Seeking Was To Modernize Its Centralized Customer Service




Background

In response to the Government of Ontario's Provincial Modernization Grant, the Corporation of the City of Cambridge ("City" or "Cambridge") received funding to review and modernize its Customer Services. Blackline Consulting ("Blackline" or "we") were contracted to complete the work.

A centralized service model (Service Cambridge) at the City of Cambridge was launched in 2019. The initial launch included several of the City's core services (tax, water, switchboard as well as general City enquiries) and established a mandate to continue onboarding additional services through 2020/21. Service Cambridge (SC) now includes the intake streams for Infrastructure Services, Recreation and Culture as well as service elements of Clerks, Planning, Building, By-law and Engineering.

Scope

The scope of this review includes four main aspects:

	Review current customer service practices and data		Recommend improvements to modernize customer services (CS)
	Perform customer journey mapping		Review the City's Customer Relationship Management system (CRM)

Objective

The objective of this document is to provide the City with our analysis and opportunities to increase the efficiency and effectiveness of SC.

To Structure Our Review We Leverage Industry Practices

We use a process framework as a basis for our review

We then met with Service Cambridge to refine and tailor the process so that it more closely aligns to their activities (see below).

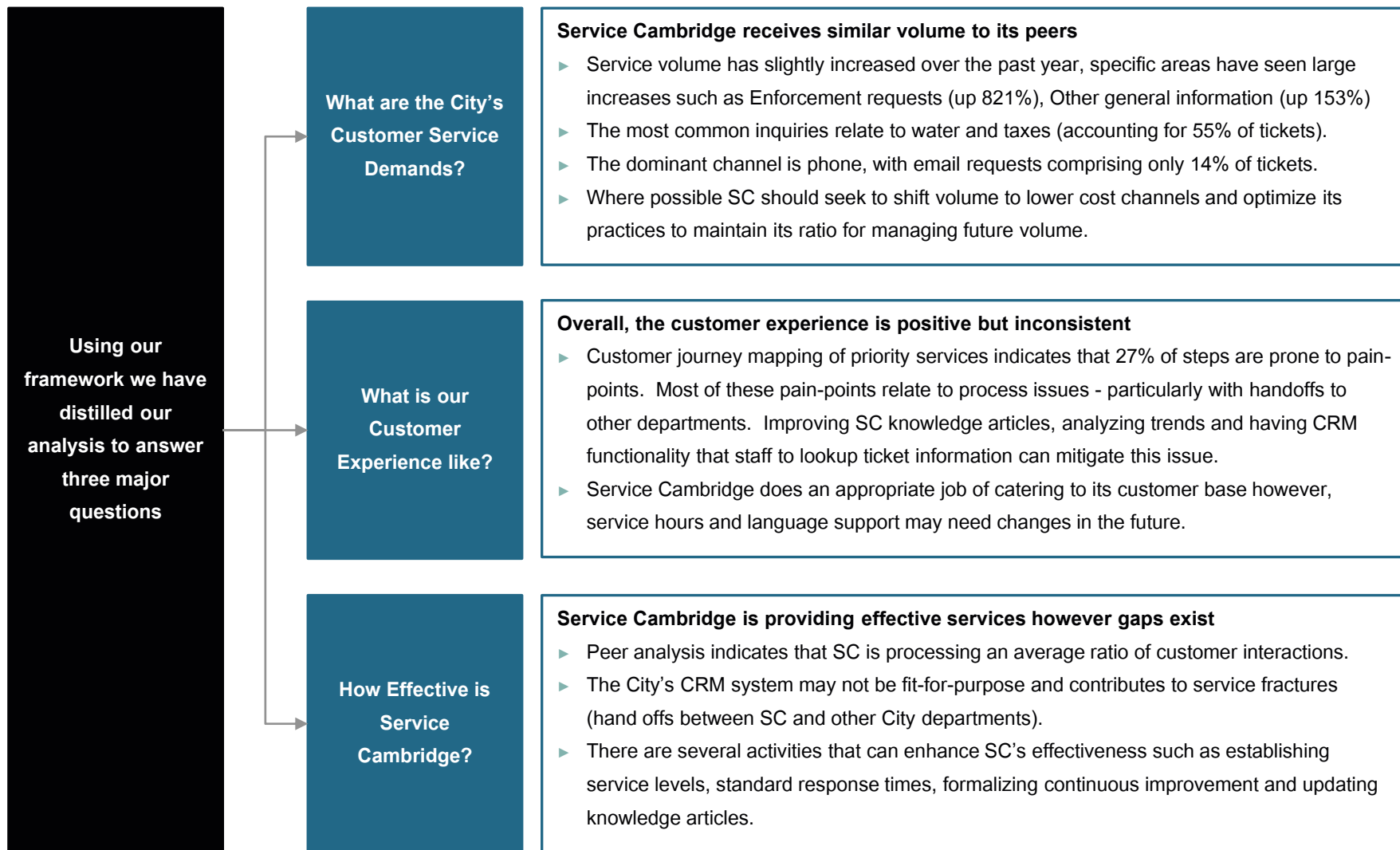
Process	Develop customer care/customer service strategy			Plan and manage customer service operations			Measure and evaluate customer service operations		
	1.0 Develop customer service segmentation/prioritization	2.0 Define customer service policies and procedures	3.0 Establish service levels for customers	4.0 Plan and manage customer service work force	5.0 Manage customer service requests/inquiries	6.0 Manage customer complaints	7.0 Measure customer satisfaction with representatives	8.0 Measure customer satisfaction with complaint resolution	9.0 Measure customer satisfaction with products and services
Sub-Process	1.1 Analyze existing customers	2.1 Define customer service	3.1 Analyze existing service data	4.1 Forecast volume of customer service contacts	5.1 Receive customer requests/inquiries	6.1 Receive customer complaints	7.1 Gather and solicit customer feedback on inquiry handling	8.1 Solicit customer feedback on complaint handling and resolution	9.1 Gather and solicit post-sale customer feedback on products and services
	1.2 Analyze feedback of customer's needs	2.2 Create CS Policy	3.2 Develop baseline	4.2 Schedule customer service work force	5.2 Route customer requests/inquiries	6.2 Route customer complaints	7.2 Analyze inquiry handling satisfaction data and identify improvement	8.2 Analyze customer complaint data and identify improvement opportunities	9.2 Solicit post-sale customer feedback on ad effectiveness
		2.3 Define supporting operational procedures	3.3 Develop service levels	4.3 Track work force utilization	5.3 Respond to customer requests/inquiries	6.3 Resolve customer complaints	7.3 Provide customer feedback to customer service management		9.3 Analyze product and service satisfaction data, identify improvements
		2.4 Train staff and communicate policy to customers		4.4 Monitor and evaluate quality of customer interactions		6.4 Respond to customer complaints			9.4 Provide customer feedback to product management

/ EXECUTIVE SUMMARY



	M	T	W	T	F
2	3	4	5		
9	10	11	12		
16	17	18	19		
23	24	25	26		
30	31				

While Customers Are Generally Pleased With Service Cambridge, Gaps Exist That Are Creating Pain-points



There Are A Number Of Opportunities To Address These Pain-points And Enhance The Services Cambridge Provides

Below we provide a summary of opportunities by three major categories



Policy / Procedures

- ▶ Developing a customer service policy and strategy.
- ▶ Expanding the Key Performance Indicators (KPIs) Service Cambridge tracks.
- ▶ Formalizing a process for analyzing ticket volume and Customer Service Representatives (CSR) utilization.
- ▶ Implementing continuous improvement by analyzing data.
- ▶ Creating a process for optimizing knowledge articles, their effectiveness and updating CSR staff.



Services / Channels





- ▶ Creating service level targets and establish clear response time expectations for the services Service Cambridge provides.
- ▶ Promoting the use of self-service to customers.
- ▶ Pilot and promote asynchronous customer service channels, such as live chat, email and social media.
- ▶ Revising the City's website to reduce duplication.
- ▶ Increase language support for walk-ins and phone channels.
- ▶ Harmonize the hours of operations.







Technology and Facilities

- ▶ Continuing with the City's plans to renovate City halls main entrance.
- ▶ Integrate systems to allow for greater transparency and flow between SC and departments.
- ▶ Reconfigure Maximo to disable automatic resolution.
- ▶ Replace the City's existing system with a purpose-built CRM system OR introduce other systems to supplement these functions.

We've organized those opportunities into eight initiatives for the City to Implement

Initiatives	Steps to Implement	Benefits
 1. Create A Customer Service (CS) Policy & Procedure	Step 1 – Establish a Team to Develop the Customer Service Policy Step 2 – Conduct Working Sessions Step 3 – Write and Approve the CS Policy and Procedure Step 4 – Launch CS Policy and Build Awareness	<ul style="list-style-type: none"> ▶ This will reduce calls relating to customer confusion and dissatisfaction. ▶ There will bring greater clarity of the roles of SC, other City departments, and its customers.
 2. Develop A Multi-year Customer Experience (CX) Plan	Step 1 – Develop Personas Step 2 – Develop Customer Journey Maps (CJMs) Step 3 – Conduct Channel Analysis Step 4 – Draft the Plan Step 5 – Approve and Implement the Plan	<ul style="list-style-type: none"> ▶ The City will have a clear plan for enhancing the CX. ▶ Greater alignment between SC and operating departments. ▶ Proactive approach to improving customer service.
 3. Establish and Track Key Metrics and Service Standards	Step 1 – Establish KPIs Step 2 – Track Metrics Step 3 – Develop Service Standards Step 4 – Monitor, Report and Optimize	<ul style="list-style-type: none"> ▶ Establishing greater alignment between the City and customer expectation. ▶ The City can ensure greater consistency of response times and resolution. ▶ The City will be able to make informed decisions using data for improvements.
 4. Enhance Knowledge Article Management	Step 1 – Review Existing KAs Step 2 – Document the New KA Procedure Step 3 – Rollout and Training Step 4 – Optimize	<ul style="list-style-type: none"> ▶ Improve customer satisfaction. ▶ Reduce the volume of transfers to operating departments and increase the share of customer requests resolved at first point of contact.

We've organized those opportunities into eight initiatives for the City to Implement (continued)

Initiatives	Steps to Implement	Benefits
 5. Update The City's Website	Step 1 – Website Assessment Step 2 – Perform Analysis of Service Requests Step 3 – Prioritize and Coordinate Changes Step 4 – Implement Changes Step 5 – Review and Evaluate	<ul style="list-style-type: none"> ▶ Diverting call and in-person volume will reduce staff effort. ▶ Customers will be able to have more robust service experience and access to some City services 24/7.
 6. Pilot And Promote Customer Service Channels	Step 1 – Define Pilot Scope Step 2 – Go to Market and Select a Vendor Step 3 – Setup the Pilot Step 4 – Pilot the System Step 5 – Evaluate Pilot Results Step 6 – Promote Use of Live Chat Step 7 – Monitor and Review	<ul style="list-style-type: none"> ▶ Reduced costs of service interactions. ▶ Increased efficiency of CSRs. ▶ Improved speed of service and access to CSRs.
 7. Develop CRM Integration Plan	Step 1 – Determine and Agree on System Integration Requirements Step 2 – Design a Target System Architecture Step 3 – Develop a Plan and Execute	<ul style="list-style-type: none"> ▶ Staff will more often be able meet customer needs at first point of contact. ▶ The effective flow of information will enable management to make responsive data-driven decisions.
 8. Go To Market For A CRM	Step 1 – Gather CRM System Requirements Step 2 – Create an RFP and go to Market Step 3 – Evaluate and Choose a Vendor Step 4 – Create a Business Case for Acquiring a CRM Step 5 – Work with the Vendor to Implement the CRM	<ul style="list-style-type: none"> ▶ Aid SC in key areas including: knowledge article management, customer triaging, CSR capabilities, data collection and utilization and ultimately customer satisfaction.

Roadmap to Enhance the City's Customer Service

The implementation of initiatives has been phased over three years

- ▶ The roadmap considers urgency, dependencies and estimated effort.
- ▶ This strategy does not presume funding for each initiative available. The City will approve each of the initiatives as part of its annual budgeting process.
- ▶ There are also several potential quick win items the City may wish to explore (see lower right table).

Following acceptance of this strategy, the City will further validate the supporting assumptions, develop more detailed implementation plans and create capital projects for budgetary approval.

Roadmap	2023		2024		2025	
Initiative	H1	H2	H1	H2	H1	H2
1. Create a Customer Service Policy & Procedure						
2. Develop a Multi-year CX Plan						
3. Establish and Track Key Metrics and Service Standards						
4. Enhance Knowledge Article Management						
5. Update the City's Website						
6. Pilot and Promote Customer Service Channels						
7. Develop CRM Integration Plan						
8. Go to Market for a CRM						

Quick Wins



- ▶ The City should continue with its renovation plans however, consider the impact of future volume.
- ▶ In the short-term engage the City's current CRM software provider to determine if it can reconfigure it so that it does not automatically close tickets before transferring to other departments.
- ▶ Revise processes to keep facility availability within ActiveNet up-to-date.
- ▶ Increase language options when calling in to Service Cambridge to include French and later expand into Portuguese, Punjabi and Urdu.
- ▶ Increase Service Cambridge hours of operations so that it is consistent with other customer service hours. Future consideration should be given to a 24/7 model.



/ INITIATIVES

1. Create a Customer Service Policy and Procedure (1/3)

Situation

The City does not currently have a customer service policy. They help to align customer expectations and acceptable behaviour.

Initiative

Create a customer service policy and procedure that formalizes acceptable behaviour for staff (and potentially customers) and defines service level targets. The policy and procedure should include the following:

- ▶ General standards around timeliness and service channel expectations.
- ▶ Whether governance and working groups are structured appropriately and working effectively
- ▶ Staff expectations
- ▶ Customer management
- ▶ Major KPIs
- ▶ Clear principles on how Service Cambridge will interact with other departments
- ▶ It should also specify ownership across the customer service process.

Steps to Implement

Step 1 – Establish a Team to Develop the Customer Service Policy

- ▶ Service Cambridge should lead the team with representatives from major customer-facing departments (i.e., community services, water, by-law, building & planning) and internal policy teams.
- ▶ The team should decide on the scope of the policy and if they will require an internal procedure document to support the policy.

Step 2 – Conduct Working Sessions

- ▶ The team should follow City practices for policy development. We expect this will include having a series of working sessions to gather information regarding customer service needs, standards and expectations.
- ▶ The team should also get consensus on definitions (what is customer service, who is a customer, in-scope services, etc.). Ideally it will also include guiding principles for staff, management and Council on common practices and whether the City will have a single point of contact for customer services.
- ▶ The working sessions should establish the content for the policy (public document) and the procedure (internal document).
- ▶ The working sessions should also determine how departments collaborate and communicate with Service Cambridge. This is especially true if it is decided they will be the single point of contact. This clarity will be important for defining the roles of Service Cambridge and the other City departments as they interact with customers.

1. Create a Customer Service Policy and Procedure (2/3)

Steps to Implement Continued






Step 3 – Write and Approve the CS Policy and Procedure

- ▶ The team will follow the City's approach to policy development (drafting, review and approval).
- ▶ Consideration should be given to the content of each document (Refer to [Appendix B](#) for common content).

Step 4 – Launch CS Policy and Build Awareness

- ▶ Once the policy and procedure has been approved Service Cambridge should work with Change Agents to implement the policy and procedure. This should consider building awareness (both internally and externally) via communications / media channels, staff / management training and reinforcement of the changes.
- ▶ The City should review the policy and procedure at a minimum on an annual basis.

1. Create a Customer Service Policy and Procedure (3/3)

 Risks	<ul style="list-style-type: none">▶ There is a risk SC and the departments involved are unable to reach a consensus on what the Customer Service Policy and Procedure should include and or the content.
 Benefits	<ul style="list-style-type: none">▶ This will reduce calls relating to customer confusion and dissatisfaction.▶ There will bring greater clarity of the roles of Service Cambridge, other City departments, and its customers.
 Resources	<ul style="list-style-type: none">▶ Internal resources will be required to complete this exercise. The internal resources should include representatives from Service Cambridge, customer facing departments like community services, infrastructure services, by-law, and planning, and Cambridge's internal policy team.
 Assumptions	<ul style="list-style-type: none">▶ Service Cambridge has the capacity to deliver and rollout this work using internal resources. However, may choose to use a third-party as an independent facilitator to help complete the policy.
 Dependencies	<ul style="list-style-type: none">▶ No dependencies.

2. Develop a Multi-year CX Plan (1/3)

Situation

Since its formation, Service Cambridge has onboarded operating departments to provide front-line customer service. However, the City does not have a formal strategy to guide its future plans on Customer Experience (CX) or relationships with other departments within the City.

Initiative

Develop a multi-year CX plan that provides the City with guidance on activities to undertake as well as determining ‘channel of choice’ and an approach to marketing channels.

Steps to Implement

Step 1 – Develop Personas

- ▶ To truly understand the City’s customers, it should define a relevant set of personas that reflect the City’s customer base. The City should identify five to seven different personas and use a variety of data sources to develop these personas. This will likely require engaging customers and operating departments.

Steps to Implement

Step 2 – Develop Customer Journey Maps (CJMs)

- ▶ While this review includes some key CJMs it does not cover all customer transactions. Using the personas the City should develop CJMs for other areas that have not yet been documented.
- ▶ The City should then perform engagement labs to document the Employee Experience (EX) and compare the results with the CJMs. This will help ensure the City has both the customer and employee in mind when it enhances the experience. Lastly, the City should use lean to assess the journey maps to determine opportunities for improvement.

Step 3 – Conduct Channel Analysis

- ▶ In addition to the CJMs, the City should review the current customer experience for each service channel. Use results to determine which steps take the most time or are difficult for customers to complete. Also consider customer viewpoints on which channels are most accessible and desired.
- ▶ Consider internal requirements including the need to evaluate services, provide cost-efficient service and make data-driven decisions.
- ▶ Assess current staff capabilities for different channels. Determine if channels are unable to be used efficiently because of limited capabilities, such as a lack of staff training or coordination between departments.

2. Develop a Multi-year CX Plan (2/3)

Steps to Implement Continued






Step 4 – Draft the Plan

- ▶ Using the information from steps 1-3 and the City's CS Policy the City should begin to develop a three-year CX strategy. This should include a vision of what the City wants the CX to be, the initiatives it will take to get there, the channels of choice and a roadmap to achieve it. The strategy should include supporting research (e.g. personas, CJMs, demographic data, channel analysis, etc.).
- ▶ As needed, define any additional Service Cambridge budget needs, including for technology, staffing levels, service levels and service channels.
- ▶ The plan should include a regular evaluation schedule with accountable Service Cambridge staff identified. The evaluation should use quantitative KPIs to measure customer service experience and the success of Service Cambridge.

Step 5 – Approve and Implement the Plan

- ▶ The City should follow its approval process, we expect this plan will require CLT approval.
- ▶ Service Cambridge should champion this plan and be held accountable for its progress.

2. Develop a Multi-year CX Plan (3/3)

 Risks	<ul style="list-style-type: none">▶ There is a risk that without a CX strategy each department will operate slightly different creating varied customer experiences.
 Benefits	<ul style="list-style-type: none">▶ The City will have a clear plan for enhancing the CX.▶ Greater alignment between SC and operating departments.▶ Proactive approach to improving customer service.
 Resources	<ul style="list-style-type: none">▶ This initiative will require internal resources from SC as well as, likely a third party to assist in the development of the plan and journey mapping.
 Assumptions	<ul style="list-style-type: none">▶ This plan will occur after the other major initiatives e.g. Initiatives #1, #7 and #8.
 Dependencies	<ul style="list-style-type: none">▶ Initiatives #1, #7 and #8.

3. Establish and Track Key Metrics and Service Standards (1/3)

Situation

Service Cambridge's CRM has limitations on its ability to track data. Consequently:

- ▶ Customers are often unaware of the differing response times by department.
- ▶ Customer often call back from confusion as a result of some areas of inquiry not having any standard response times.
- ▶ Customers often leave voicemails for unresolved tickets that are transferred to departments, causing a service failure.
- ▶ Lastly, there are few formal processes in place for Service Cambridge to leverage data for identify improvements.

Initiative










Establish a set of Key Performance Indicators (KPIs) and service standards to track, manage and improve customer service. In addition, Service Cambridge should report on its performance to City leadership on a regular basis.

Steps to Implement

Step 1 – Establish KPIs

- ▶ Service Cambridge should prioritize KPIs. To the left are a set of common KPIs to measure customer service. SC should also consider the customer channels as it relates to those metrics (e.g. phone, online, in person).

Key Metrics to Consider Tracking

	First Contact Resolution	Percentage of customer inquiries resolved at first point of contact (e.g. not sent to another department).
	Accuracy of Triaging	How often do department contacts have to re-triage a customer to connect them with appropriate staff.
	Abandonment Rate	Percentage of customers who end interaction without resolution.
	Unresolved Requests	Requests still outstanding past a threshold (e.g., x days).
	Hold Time	Time customers spend on hold, particularly during transfers (ideally also by time of day).
	Ticket Volume and Type	How many tickets are being submitted during a given period and its categorization.
	Resolved Tickets	The number of tickets which are received and resolved within a given period of time (e.g., monthly).
	Escalation Rate	Percentage of customer inquiries which are escalated to an individual with greater specialized knowledge.
	Customer Satisfaction	Customer feedback as it relates to customer service they received. This may be gathered through surveys, focus groups, etc.

3. Establish and Track Key Metrics and Service Standards (2/3)

Steps to Implement Continued

Step 1 – Establish KPIs (continued)

- ▶ SC working with IT should assess the extent to which the City is able to efficiently track these KPIs, the data source and frequency. Where limitations exist, these should feed into Initiative #8 – CRM requirements.

Step 2 – Track Metrics

- ▶ SC should become an aggregator of customer service KPIs. In some cases, the data may exist in other departmental systems. On a set frequency (to be established) SC should aggregate the KPI data into a customer service dashboard. Initially this dashboard may not be very robust as it is highly contingent on CRM functionality, relating data from other sources (e.g. phone, web and other departmental systems). SC should evolve this tracking over time as technology enhancements are made.

Step 3 – Develop Service Standards






- ▶ Next, the City should develop a set of service standards. Typically, this will relate to certain KPIs e.g. response time, first contact resolution (responsiveness), resolution duration.
- ▶ For each customer transaction, SC should use existing KPIs to build a baseline on what is currently achievable. This will allow the City to establish formal service standards with customers and between departments.

Steps to Implement Continued

Step 4 – Monitor, Report and Optimize

- ▶ Monitoring results allows an organization to calibrate targets appropriately in order to better serve staff. For instance, if you consistently deliver above 95% on a service that has a formal service standard of three business days to resolve, perhaps it is time to increase the target, and aim for two business days. Service standards permits the identification of trends and areas where the City can make improvements.
- ▶ Establish a process for collecting and presenting this information. This process should include information such as frequency of running and presenting reports, process of reporting on issues, etc.
- ▶ The framework should also include a continuous improvement plan with an accountability mechanism when the service standard is not met.
- ▶ Additionally, SC should begin to use KPI data to perform root cause analysis for re-occurring issues.

3. Establish and Track Key Metrics and Service Standards (3/3)

 Risks	<ul style="list-style-type: none">▶ Staff may not properly track metrics, leading to inaccurate data and standards.▶ Delays to implementing a new CRM could impact the City's ability to report on metrics.
 Benefits	<ul style="list-style-type: none">▶ Establishing greater alignment between the City and customer expectation.▶ The City can ensure greater consistency of response times and resolution.▶ The City will be able to make informed decisions using data for improvements.
 Resources	<ul style="list-style-type: none">▶ Internal resources from Service Cambridge and Department representatives will be responsible for the creation of metrics and KPIs.▶ All applicable staff within the organization will be responsible for tracking KPIs and metrics.
 Assumptions	<ul style="list-style-type: none">▶ Service Cambridge has the capacity to deliver and rollout this work using internal resources.▶ It also assumes that reporting will not require a data warehouse or BI solution.
 Dependencies	<ul style="list-style-type: none">▶ This opportunity is fully dependent on Initiative #1.▶ This opportunity is partially dependent on Initiative #7 and #8.

4. Enhance Knowledge Article Management (1/3)

Situation

Service Cambridge does not have a formal procedure to proactively update and enhance its Knowledge Articles (KA).

In addition, Of the 422 issue categories SC has, many are rarely used. More than 300 categories had fewer than 100 tickets generated over the 600 days included in the dataset, and 136 categories had fewer than 10 tickets generated. A full 45 categories had only one ticket each. The distribution of these categories means that revising knowledgebase articles and processes should be prioritized by frequency.

Initiative

Create a procedure for managing KAs so they are up to date and relevant.

Steps to Implement

Step 1 – Review Existing KAs

- ▶ SC should create an index of all KAs, including information such as:
 - Issue category
 - Relevant service
 - Volume (high, med, low)
 - The escalating City department
 - The City subject matter expert
 - The date of last review
- ▶ This will create a baseline for which SC can begin to review and update. SC should review all existing KAs. It should start with higher volume transactions / issue categories. The review should include SC representatives as well as any relevant operating departments to ensure both agree the KA is fit-for-purpose. For any that require revision SC should work with the appropriate City representatives to update the content.
- ▶ Lastly, SC should work with other City departments to ensure there are no missing KAs. Where gaps exist SC should work with City department SMEs to create the KA.

4. Enhance Knowledge Article Management (2/3)

Steps to Implement Continued

Step 2 – Document the New KA Procedure

- ▶ After reviewing and updating the City's KAs, SC should work with City departments to create procedure to keep the KAs up to date, as well as the process for creating new KAs.
- ▶ The City should be mindful of how technology will support this procedure. If Cambridge acquires a new CRM (see Initiative #8), then the specifics of that system will likely influence this procedure.
- ▶ The procedure should include at a minimum, annual reviews, clearly define roles and responsibilities (SC and operating departments), and an approval process.






Step 3 – Rollout and Training

- ▶ Roll the new procedure out to CSRs, ensuring they understand how to access the information they need and report any inconsistencies.
- ▶ Provide subject matter experts in the operating departments with guidelines on how and when to update KAs. It may be appropriate for this to include regularly scheduled knowledge article review.

Step 4 – Optimize

- ▶ Review the effectiveness of the new procedure after it has been in place for a quarter. Meet with CSRs to assess how well supported their work is by the new process. Are they frequently encountering out of date content? Are KAs lacking key information?
- ▶ Meet with other departments to understand their views on current effort to maintain knowledge articles. Adjust responsibility and optimize the procedure based on this review.

4. Enhance Knowledge Article Management (3/3)

 Risks	<ul style="list-style-type: none">▶ It will be critical to have buy-in from the broader group of departments whose customer service goes through Service Cambridge. Without this broader alignment, Service Cambridge will still face the same challenges it does today.
 Benefits	<ul style="list-style-type: none">▶ Improve customer satisfaction.▶ Improved KAs should reduce the volume of transfers to operating departments and increase the share of customer requests resolved at first point of contact.
 Resources	<ul style="list-style-type: none">▶ One-time effort from Service Cambridge staff and operating department representatives to establish the new procedure.▶ On-going effort from whomever at Service Cambridge is tasked with KA management. Currently this is the Customer Service Coordinator.
 Assumptions	<ul style="list-style-type: none">▶ Service Cambridge has the resources to establish this new procedure and update current knowledge articles to align with the new template it establishes.
 Dependencies	<ul style="list-style-type: none">▶ This initiative is partially dependent on Initiative #8. Specific knowledge article management features in a new CRM system would influence the specifics of this procedure. Ideally enhancing the process, not hindering it.

5. Update the City's Website (1/3)

Situation

The City receives a large volume of inquiries relating to similar issues. In particular, water and tax-related billing inquiries comprise more than half of overall service volume, and with the most common single issues (relating to account balances, statements, and account setups). These issues are time intensive, however the City's website does provide functionality for customers to self-serve.

In addition, the website has duplicate ways to perform the same function either via the department page or the Service Cambridge. This can cause confusion for customers. Resident feedback did indicate that the website is difficult to navigate.

Initiative

Revise the City's website to enhance its self-service offerings and improve customer awareness.

Steps to Implement

Step 1 – Website Assessment

- ▶ Engage a web design firm to perform a fulsome assessment of the City's website. Ensure a focus of the assessment is on the User Experience (UX) as it relates to the ease of finding information and performing transactions that have a high volume (water / tax - account balances, statements, account setups, payment, etc.).
- ▶ The assessment should also determine the best approach for designing a website with a principle of having Service Cambridge as the first point of contact. This will help support the City's customer service policy and procedure.
- ▶ The assessment should also review how the City will maintain content and the web site governance (accountabilities / responsibilities).

Step 2 – Perform Analysis of Service Requests

- ▶ Working with the web designer, the City should also perform a root cause analysis to determine the key drivers for calls that could instead be answered through self-service. This will help inform potential changes to the website however may not be exclusive to issues with the website. For example, the root cause may indicate by changing the layout / format of the tax bill we can potentially reduce several calls to the City.

5. Update the City's Website (2/3)

Steps to Implement Continued

Step 3 – Prioritize and Coordinate Changes

- ▶ In addition, the website is one channel of many that the City will continue to use. As such, the City should engage other operating departments to understand any volume they receive directly from customers to understand if there are any changes to the web that could assist them. Lastly, the City should work closely with IT from step 1 onwards to ensure they are able to provide input and align any existing technology changes with web changes.
- ▶ Following steps 1 and 2 the City should prioritize a set of changes to the website and any supporting / enabling changes. It should also identify any dependencies on a new CRM and feed that into Initiative #8.






Step 4 – Implement Changes

- ▶ The City should work with the web designer and appropriate individuals at the City to execute the plan to revise the website. The City should also work with Communications to ensure there is an awareness program both internally / externally to educate and promote the changes. This will help ensure better adoption.

Step 5 – Review and Evaluate

- ▶ Once the changes are live the City should monitor closely key metrics to see the impact of the changes as well as conducting regular customer surveys of users of the website as well as those that still use other channels to understand what is working and why some customers still prefer other channels.
- ▶ Using this information Service Cambridge should identify future improvement opportunities as part of its continuous improvement procedures.

5. Update the City's Website (3/3)

 Risks	<ul style="list-style-type: none">▶ Without promotion and awareness of the websites self-service functionality customers will still use phone or walk-in.▶ Content is not refreshed and becomes stale after updates.
 Benefits	<ul style="list-style-type: none">▶ Diverting call and in-person volume will reduce staff effort.▶ Customers will be able to have more robust service experience and access to some City service 24/7.
 Resources	<ul style="list-style-type: none">▶ City resources will likely require representation from communications, IT, SC and City departments.
 Assumptions	<ul style="list-style-type: none">▶ We assume the City has the resources, capacity and capability available to perform the work in-house.
 Dependencies	<ul style="list-style-type: none">▶ Initiative #1, #7 and #8.

6. Pilot and Promote Customer Service Channels (1/3)

Situation

Similar to its peers the City provides services via a number of channels (omni-channel). This includes: phone (via a call centre), service desks at City Hall, and receptionist services at recreational facilities, the web and email. Analysis indicates that the majority of customer contact is via phone which is labour-intensive and a higher cost channel in comparison to the alternatives. In comparison, the web self-serve usage is quite low. While this is similar to peers it does present an opportunity to provide a more cost-efficient service.

Initiative

Pilot asynchronous customer service channels, such as live chat to improve customer cost efficiency per CSR and reduce staffing needs for peak demand periods.

Steps to Implement

Step 1 – Define Pilot Scope

- ▶ Following the City's procurement by-laws, create an RFP for live chat / chatbot system. The scope of this RFP should also clearly state that it is for a pilot program and its use is dependent on the success of it.
- ▶ Determine evaluation criteria, including the extent to which this system can integrate with a new CRM system.
- ▶ Set clear expectations on what the pilot will achieve (e.g. goals to ensure the City is able to measure whether the pilot is successful or not).

Steps to Implement

Step 2 – Go to Market and Select a Vendor

- ▶ Evaluate vendor proposals and select a proponent. As the technology will impact several areas within the City, the evaluation committee should be comprised of representatives from different departments and areas.
- ▶ Determine if there are key dependencies of this pilot on the City's CRM and whether the pilot can continue.

Step 3 – Setup the Pilot

- ▶ Working with the vendor IT, configure the chat system. The configuration should focus on:
 - Activating the chat system to connect customers with CSRs via the City's website or through a mobile app, and
 - Implementing a business rules-based AI chat system to answer and divert common inquiries or issues from being handled manually.
- ▶ The priority should focus on testing the viability of the live chat, with a secondary goal of testing a chatbot. We suggest this because chatbots require accurate, complete and comprehensive knowledge articles and decision-tree information to provide the correct advice.
- ▶ Working with a set of City staff, the City should beta test the live chat system and gather feedback (both from a customer perspective as well as from a CSR perspective). This may highlight necessary changes e.g. training, functionality, performance, etc.

6. Pilot and Promote Customer Service Channels (2/3)

Steps to Implement Continued

Step 4 – Pilot the System

- ▶ Once the chat system configuration and beta testing is complete the City should work with the vendor to pilot the system. Roll the chat system out to a set number of customers and perform the pilot study. Be certain to arrange feedback mechanisms. In addition, the City should measure the quality and effectiveness of the pilot both from a staff perspective and customer.

Step 5 – Evaluate Pilot Results

- ▶ Informed by the pilot results, the City should create a business case for using the chat system (with the potential of using a chatbot/AI in later phases) across other services and allowing any customers to use it.
- ▶ The business case should include analysis of costs per interaction, customer satisfaction, and ability scale the system up or down to meet customer demand. Effectively the business case should compare the current state (phone / walk-in) versus the chat from a cost, quality and customer experience perspective.

Steps to Implement Continued






Step 6 – Promote Use of Live Chat

- ▶ Assuming a positive business case, the City should roll out the chat system. This may occur in two phases, the first focusing on the live chat and the second the chatbot. This phased approach may be required to ensure the chatbot has sufficient data / information to appropriately address customer inquiries.
- ▶ The rollout should include standard activities such as staff training, awareness program internally and externally.
- ▶ Conduct campaigns on website and service channels to promote use of asynchronous customer service channels and reduce volume to in-person and phone service channels.

Step 7 – Monitor and Review

- ▶ Create and monitor KPIs to ensure customer satisfaction, response times, and staffing needs meet organization goals.

6. Pilot and Promote Customer Service Channels (3/3)

 Risks	<ul style="list-style-type: none">▶ Promoting asynchronous service channels does not shift customer behaviour.▶ The City does not establish clear goals for the pilot making it difficult to evaluate its performance (successful or not).
 Benefits	<ul style="list-style-type: none">▶ Reduced costs of service interactions.▶ Increased efficiency of CSRs.▶ Improved speed of service and access to CSRs.
 Resources	<ul style="list-style-type: none">▶ This initiative will require City resources from Procurement, IT, Service Cambridge, and Communications at a minimum.▶ It will also require a chat system vendor to setup, configure and support the pilot.
 Assumptions	<ul style="list-style-type: none">▶ The City has the resource (capacity) to perform this pilot.▶ There is sufficient use during the pilot to properly evaluate its viability.
 Dependencies	<ul style="list-style-type: none">▶ Initiative #5, and potentially #7 and #8.

7. Develop CRM Integration Plan (1/3)

Situation

There is a lack of integration between the City's CRM, operating department systems (i.e., AMANDA, Collector, Maximo, etc.) and other technology (e.g. phone, web, email). This impedes efficiency and communication between customer service representatives, other City departments and customers.

- ▶ As a result, tracking service request resolution is difficult. It is also challenging to track progress on service requests once it requires transfer to a department / division.
- ▶ Consequently, staff duplicate data entry across multiple systems. Likewise, customers end up explaining their situation multiple times causing frustration.

Initiative

Integrate systems to allow for greater transparency and knowledge flow between Service Cambridge and the operating departments.

Steps to Implement

Step 1 – Determine and Agree on System Integration Requirements

- ▶ Service Cambridge, IT and key individuals in the operating departments should work collaboratively on developing integration requirements. To accomplish this, the City should first, looking at current processes, identify which activities currently have system support. Next, apply a LEAN lens particularly where is there duplication, disruption of flow and wait times due to lack of system integration. Finally, capture these opportunities as business and technical requirements.
- ▶ The team should also prioritize integration requirements, for example consider customer transaction volume, customer pain-points and ease of integration.

Step 2 – Design a Target System Architecture

- ▶ Next, the City should design a target system architecture for Service Cambridge. It should specify how data will flow from the CRM to other systems. See [Appendix C](#) for a conceptual example. The target architecture should clearly identify current and future integration points, data flow direction (uni / bi) and frequency (as not all data needs to flow real-time).
- ▶ Consideration should be given to provide this data as an input into the CRM RFP (Initiative #8) to help inform the CRM solution and ensure it meets the City's current and future needs.

7. Develop CRM Integration Plan (2/3)






Steps to Implement Continued

Initiatives #7 and #8 are closely linked. Step 3 below relies heavily on the CRM business case created through the course of Initiative #8. The need to implement a CRM system would greatly impact the City's integration needs. The plan developed in Step 3 may need revision, bearing in mind the ideal system architecture designed in Step 2.

Step 3 – Develop a Plan and Execute

- ▶ Once the City has received responses from the CRM RFP, IT should reflect on the architecture and integration requirements to see what is feasible. The City will need to make critical decisions at this point, such as whether Cambridge should buy an Integration API or build it themselves. Since not all operating departments manage customer data in the same system it will be critical to identify any system-specific challenges.
- ▶ In conjunction with the CRM selection in Initiative #8, the City should develop a more detailed CRM and integration implementation plan. IT should also consider existing project plans and if any synergies may exist to align the plans.

7. Develop CRM Integration Plan (3/3)

 Risks	<ul style="list-style-type: none"> ▶ Unanticipated implementation challenges extend the timeline to make these changes.
 Benefits	<ul style="list-style-type: none"> ▶ With better access to customer details staff will more often be able meet customer needs at first point of contact. ▶ The effective flow of information will enable management to make responsive data-driven decisions (e.g., resolution times, comprehensive customer profiles, etc.)
 Resources	<ul style="list-style-type: none"> ▶ One-time staff effort to develop and implement the strategy. Cambridge will need to perform for regular system maintenance. Staff from Service Cambridge and Technology services will be heavily involved. Staff from operating divisions with high customer service volume (e.g., Ambassador Program, Recreation & Culture) will need to provide input at key stages.
 Assumptions	<ul style="list-style-type: none"> ▶ We assume the City has the resources to perform steps 1-3. Implementation may require a third-party System Integrator.
 Dependencies	<ul style="list-style-type: none"> ▶ Partially dependent on Initiative #8. This Initiative should be carried out first as #8 will be largely informed by the System Integration Strategy. However, the City should bear in mind the impact that potential system acquisition could have on the rollout of this strategy.

8. Go to Market for a CRM (1/2)

Situation

The City's CRM lacks certain functionality to effectively manage customer needs. For example, it does not provide a unified view of a customer's interactions with the City. Customers will find processes requiring multiple interactions more cumbersome as a result.

- ▶ Other key gaps include system support for the routing of customer inquiries and advanced knowledge article management features.
- ▶ Market analysis indicates that many CRM products include notable features not found in the current software.

Initiative

Replace the City's current CRM with a purpose-built CRM.

Steps to Implement

Step 1 – Gather CRM System Requirements

- ▶ Collect requirements for replacing the City's current CRM. The main categories of functionality can be found in [Appendix C](#). Prioritize key functionality based on what is mandatory for business operations.
- ▶ Define CRM integration requirements (see [Initiative #7](#)).

Step 2 – Create an RFP and go to Market

- ▶ Following the City's purchasing by-law, Service Cambridge should create an RFP and go to market. This will likely require input from Technology Services and management from operating departments.

Steps continued

Step 3 – Evaluate and Choose a Vendor

- ▶ Create evaluation criteria to thoroughly compare the vendors' products.
- ▶ Next, evaluate vendor proposals. This will be a collaborative effort involving Technology Services. Identify the highest scoring vendor as per the criteria.
- ▶ Optional sub step: schedule demo sessions with prospective vendors. The City should layout specific priority functionality it expects to see, as per the prioritization in Step 1.






Step 4 – Create a Business Case for Acquiring a CRM

- ▶ Create a business case for acquiring a CRM based on the highest scoring vendor's offering. The City should compare the system features vendors are offering with the system SC currently uses. Compare the prices vendors provide to the current system's licensing cost.
- ▶ There is a strong business case to move forward if the cost of acquiring / implementing the new CRM is outvalued by the functionality it provides in comparison to the current system.

Step 5 – Work with the Vendor to Implement the CRM

- ▶ Implementing the CRM will require participation from Technology Services as well as user groups within other departments. See [Appendix C](#) for further details on resource requirements.

8. Go to Market for a CRM (2/2)

 Risks	<ul style="list-style-type: none">▶ The benefit of a new CRM may be outweighed by the cost of acquisition and implementation.▶ If the City goes forward with implementing a new system, there is a risk that Service Cambridge operations are disrupted through the system roll out phase.
 Benefits	<ul style="list-style-type: none">▶ Aid Service Cambridge operations in key areas including: knowledge article management, customer triaging, CSR capabilities, data collection and utilization and ultimately customer satisfaction.
 Resources	<ul style="list-style-type: none">▶ This work will require the formation of a project team consisting of key individuals from Service Cambridge and the City's Technology Services. This team will need to be engaged throughout the lifecycle of the project.
 Assumptions	<ul style="list-style-type: none">▶ The City has the resource capacity required to carry out this project.▶ This Initiative will be carried out after Initiative #7. The City will coordinate its potential acquisition of a CRM with the requirements of its new System Integration Strategy.
 Dependencies	<ul style="list-style-type: none">▶ Initiative #7 will inform how this project is carried out.



/ APPENDICES

There was low response to the customer survey

A brief customer satisfaction survey was provided to recent contacts

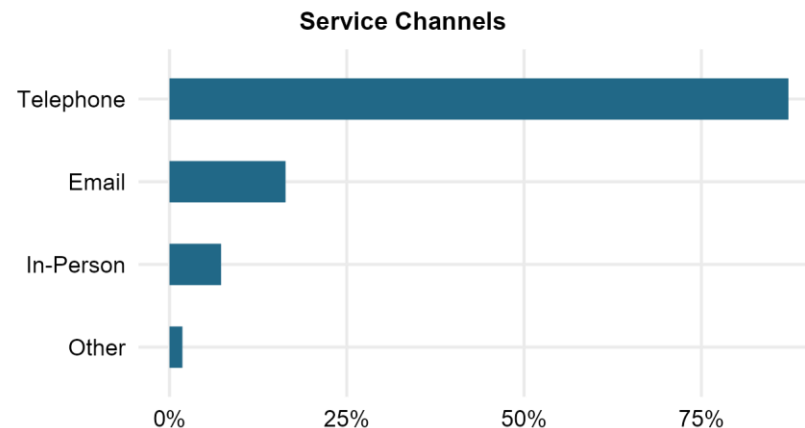
- ▶ As part of the project, Blackline conducted a focused voice-of-the-customer survey of Cambridge residents who had recently contacted Service Cambridge to understand their attitudes, expectations and preferences regarding customer service at the Municipality.

The online survey was available from October 13 to December 16

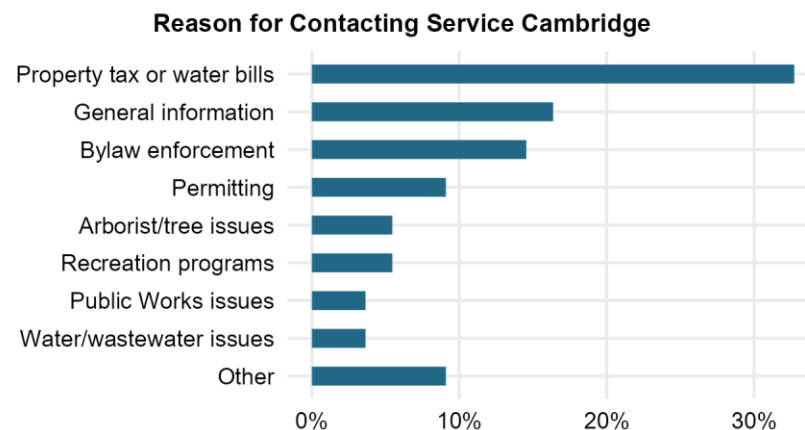
- ▶ The City provided a website redirect to the survey site and provided . After a low response, in December Service Cambridge assigned two Customer Service Representatives to interview recent customers. After two days of calling, 47 additional responses were obtained,
- ▶ There is a total of 55 responses from residents. The median length of time to complete the questionnaire was 7 minutes. As an online, opt-in survey no margin of error can be assigned to the results. Responses are unweighted.

Respondents reported use of service channels and issues in line with administrative data

- ▶ As with administrative data, the most common reason for contacting the City was for issues related to property tax or water bills. Other common issues were general information and bylaw enforcement.
- ▶ The most common service channel used by respondents was telephone.



Question text: Which of the following service channels did you use?



Question text: For what reason did you most recently contact the City of Cambridge?

Appendix A

The most important driver of overall satisfaction is helpful service

Helpful service is the most important driver of overall customer service satisfaction

- ▶ Service Cambridge strengths helpful and knowledgeable staff.
- ▶ Priority areas include improving service resolution in a single interaction and limiting wait times for customers.

Blackline conducted a regression analysis to understand what factors drive overall satisfaction

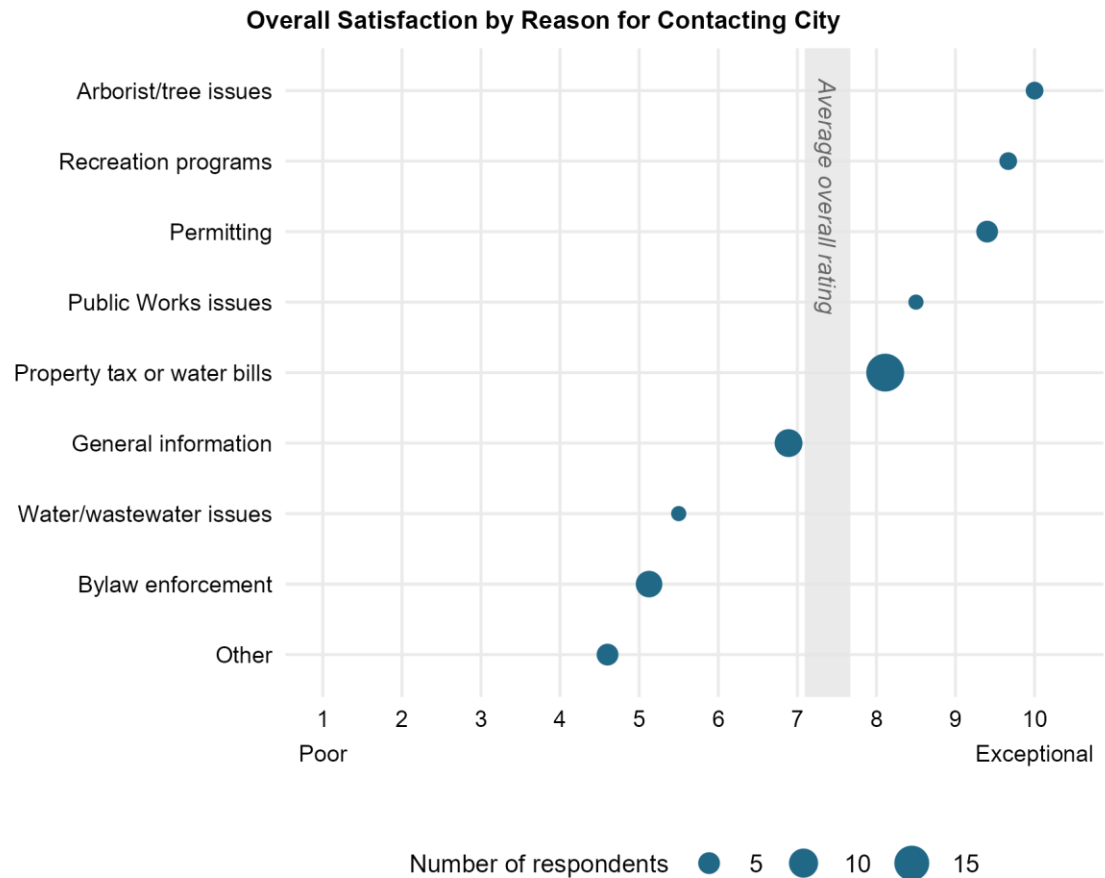
- ▶ Strengths or areas to continue relate to a helpful behavior of ITS staff and their ability to successfully resolve issues.
- ▶ Areas to improve / review include timeliness / responsiveness, first call resolution, having more modern systems and automating manual activities (business processes).
- ▶ As the scores are based on averages, being in the left/right or top/bottom quadrant means a score above or below the average.
- ▶ Overall, this is a positive survey result



Most respondents say they had a good customer service experience

Four in ten respondents rated the service they received as “exceptional”

- ▶ 61% of respondents rated their customer service with eight stars or more. 20% of respondents gave five to seven stars. 18% of respondents gave four or less stars.
- ▶ While this survey has low sample sizes, cross tabulations between overall satisfaction ratings and categorized reasons for service can be used to pinpoint specific service issues. Results indicate that bylaw and water/wastewater issues may receive lower than average satisfaction, while tree, recreation and permitting issues have higher than average satisfaction.



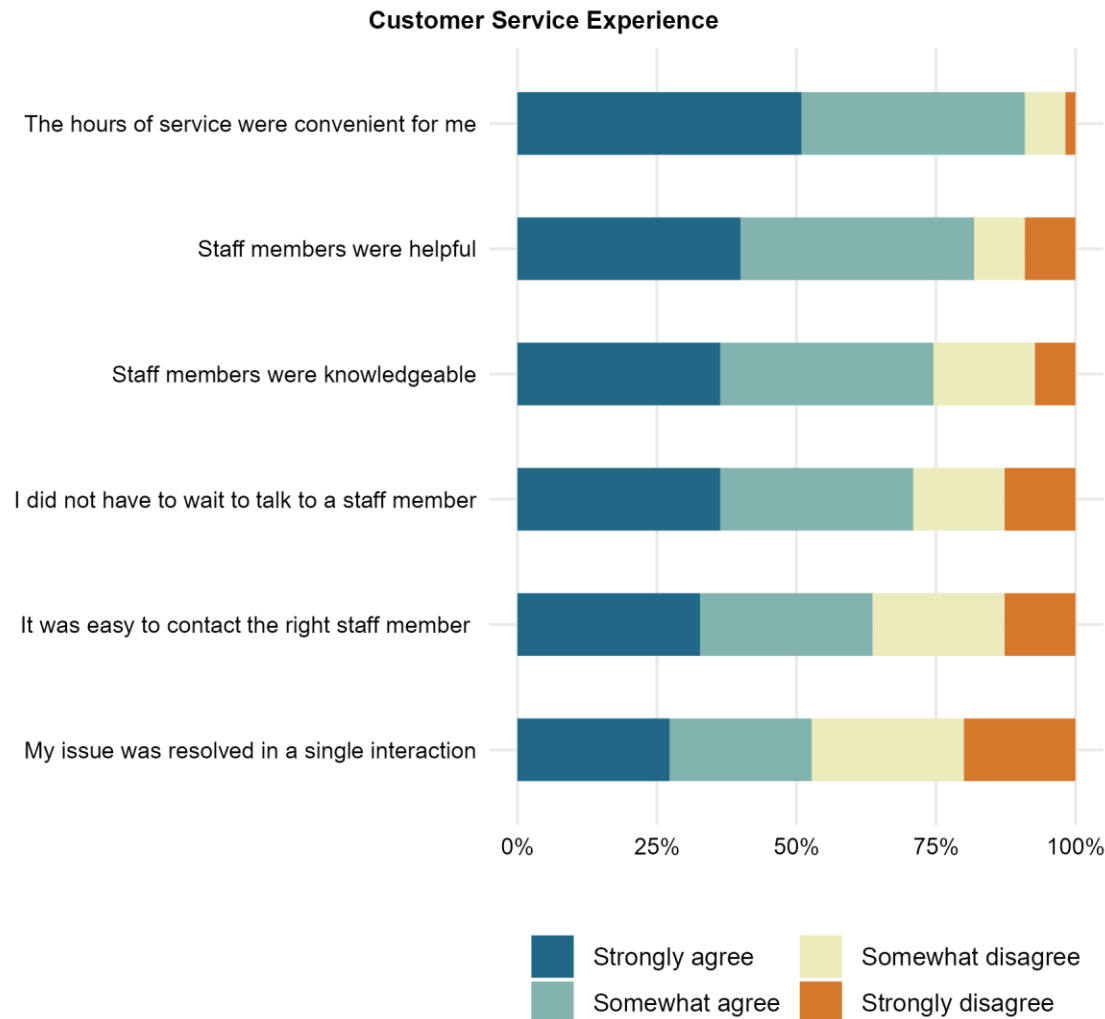
Question text: Overall, how would you rate your customer service experience?
1 star = Poor, 10 stars = Exceptional
For what reason did you most recently contact the City of Cambridge?
Caution: low number of respondents

Appendix A

Respondents found staff helpful and knowledgeable

Some respondents had difficulty resolving their issue in a single interaction

- ▶ Most respondents say the hours of service were convenient and staff members were helpful and knowledgeable.
- ▶ However, only half of respondents had their issue resolved in a single interaction. Some respondents also reported it was not easy to contact the right staff member."



Respondents provided a range of feedback and comments

Some respondents note they encountered difficulty in resolving their issue directly

- ▶ While some respondents expressed positive sentiments, some noted issues related to call escalations to operating departments, or having to call or email multiple times to resolve their issue.

Example Verbatim Responses

- ▶ *“Agent was helpful - transferred to bylaw - have not heard back”*
- ▶ *“Spoke with supervisor, issue was resolved, not happy with response time on getting issue looked at”*
- ▶ *Great experience, best service they've had in a long time”*
- ▶ *“good experience overall!”*
- ▶ *“Website is a little tricky but pretty new to it, no complaints”*
- ▶ *“Upset about parking issues not being addressed, wants response, tried contacting counsellor, Mayor, no response”*
- ▶ *“Takes a long time to reach by-law - if you call the direct number they take weeks to respond - issue has not yet been resolved”*
- ▶ *“Polite conversation with no follow through.”*

Appendix B








Customer Service Policy

To the right is a list of elements which should be considered when developing the Customer Service Policy and Procedure.

Element	Description
Policy Statement	► Summary on the purpose of the policy and what it will cover.
Scope	► Information on whom and what the policy applies to.
Supporting Policies & Procedures	► Includes a list of any current policies within the City which are relevant to the Customer Service Policy (i.e., any accessibility policies).
Definitions	► List of key terms and their definitions as they apply to the policy.
Defined Roles & Responsibilities	► Breaks out the different roles within the City and clearly details each role's customer service responsibilities.
Service Standards	► Expectations and general rules for customer service engagements. For example, standard response times.
Staff Support	► How staff will be supported while delivering customer service. For example, resources available to staff and standard practice as it relates to escalations.
Evaluation of Customer Support	► How customer support will be evaluated within the City. For example, customer satisfaction surveys.
Review of Policy	► Details on how often the Customer Service Policy will be reviewed.

Appendix C

CRM – Key Functionality

Key Functionality*	Description
 Reporting and Analytics	Generate reports and review dashboards of key metrics. Ability to extract and analyze customer service data.
 Ticketing and Workflow	Create tasks and / or tickets to manage requests. Automate activities such as approvals, notifications assigning tickets using workflow.
 Knowledgebase	Create and update knowledge articles for CSRs to utilize. Ideally in a searchable database.
 System Integration	The ability to integrate with the City's phone system, the City's website / online forms and other key software like payment collections system.
 Decision Trees	Create decision trees to help CSRs route customer inquiries effectively.
 Customer Access	Customers can submit service requests / make inquiries through various channels at their discretion: live chat, email, telephone, self service portal etc.
 Centralized Dataflows	Regardless of what channels customers utilize, their requests are captured in a centralized system that includes key information for Service Cambridge staff (e.g., customer interaction history).

*Functionality listed here is based on analysis of the City's specific CRM needs.

Appendix C

CRM – Conceptual Model for Integration

There are two aspects of integration the City should think about as it considers a new CRM solution

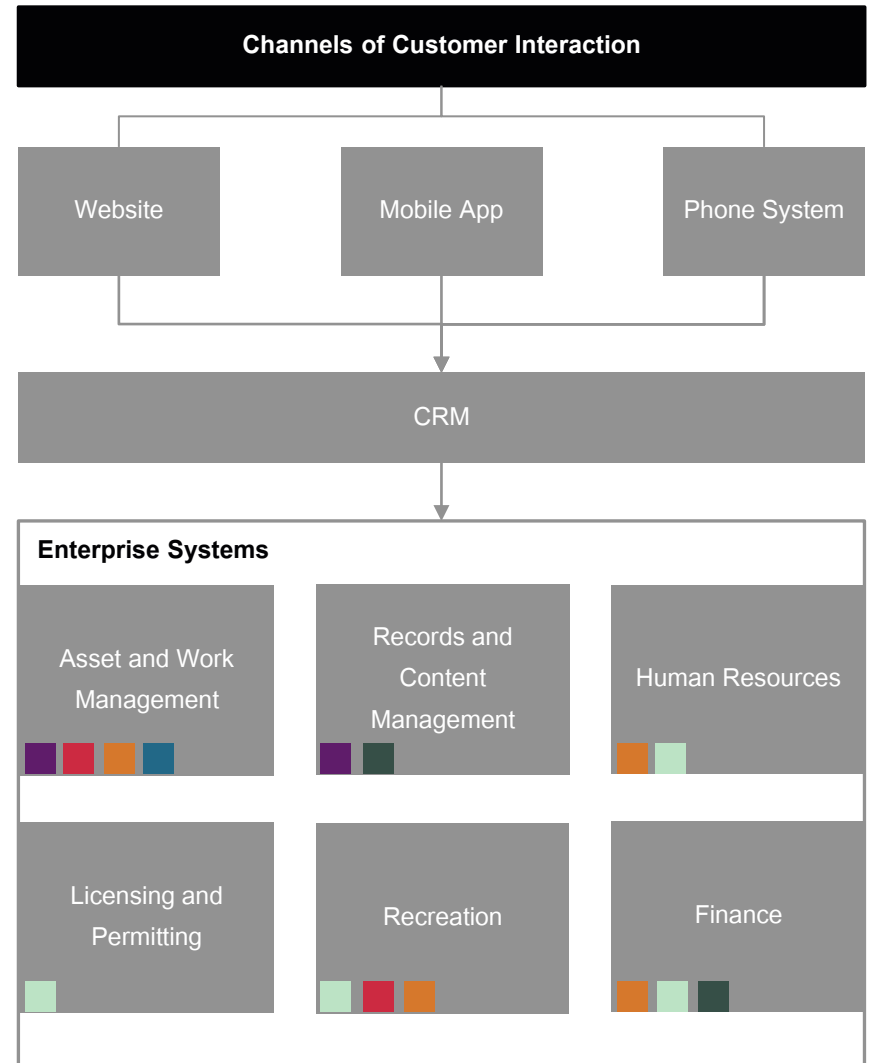
- ▶ The City's current ability to integrate and share data
- ▶ The benefits of integrating a CRM with other City systems / data that comes through various customer channels. Given that the City is considering a CRM solution, the categories of data for sharing may include:

Type of Data	# of System Potentially Using
Location	5
Asset characteristics	4
Financials	4
Personal details	1
Service requests	2
Property details	3

To the right we illustrate the potential for data sharing between the CRM solution and other City systems.

An additional complication of integration is the frequency of updates

Organizations will have less control over the timing of upgrades. This needs to be considered for the ongoing maintenance and cost of ownership.



Appendix C

CRM – Implementation Effort

The implementation effort varies between vendor solution. We have estimated the amount of staff time required for an implementation. This is based on Blackline's previous experience. We recommend that as part of Initiative #8 the City include a requirement that the vendor provides details as to the City resources the require.

Staff have the knowledge of the processes and are needed to share that knowledge, approve changes and test implementation at the very least.

- ▶ Additionally, the City must provide project management oversight.
- ▶ The table to the right shows our initial estimate of the amount of staff time likely required.
- ▶ Total FTE based on the amount of effort required to configure system, processes and activities involved, reporting, testing and training.

Area	FTE Breakdown
Technology Services	2.40 – 3.00
Service Cambridge	1.75 – 2.25
Operating Divisions	0.25-0.75 depending on the integration
Procurement	0.60 – 1.20
Project Management	1.00
Total	9.75 – 11.45

Appendix C

CRM – Pricing Information

The three factors we find have the largest impact on price are functionality, complexity and number of users

The table below expands on these factors and indicates where the City fits against these criteria.

Factor	Drivers	Implications to the City
Breadth of functional coverage	The number of processes to be supported by the new solution. Simplistically, the more processes you implement the more elements of the system you will require often translating into module costs and implementation costs.	High: The City is seeking functionality to cover a broad range of functionality and processes.
Complexity of processes	While somewhat difficult to define, complexity is the degree to which your processes vary from the common practice implemented within the vendors solution. Typically, variation comes from needing to accommodate exceptions to a standard process.	Highly complex: While many of the processes we identified were not overly complex or uncommon, they will require integration with other systems. This will make the implementation more complex.
Number of users	While license models vary greatly between vendors, they all attempt to quantify the amount of 'work' the system will do. A simple measure of this is the number of users. With evolving technology, vendors have created models based on transactions, system processors and virtual instances. Number of users remains a good proxy to any of these license models and with the continued emergence of cloud, likely will become the predominate license model again.	Moderate: The City is a medium to large sized City in Ontario.

If the City decides to move away from its current system, the key difference will likely be the one-time expense (and effort) to implement the system, not necessarily the ongoing licensing fee.

