



Customer Service Strategy & Implementation Plan

Final Report

Prepared by:



20 Bay Street – 11th Floor, Toronto, ON M5J 2N8

P: 905.477.5544

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Executive Summary

I. Introduction

Building on insights uncovered throughout the Discovery and Employee / Customer Consultation Stages, this report is structured to define the vision for the Town's operating model, technology requirements, and performance measurements in support of more efficient and modernized service delivery. The objective is to equip the Council and Senior Administration with a clear service framework and roadmap to guide the following Customer Service items.

- ✓ Development of a Formal Customer Service Policy including Corporate Customer Service standards and service levels.
- ✓ Recommendations for initiatives to be undertaken that improve Service Experiences for Customers.
- ✓ Recommendations for opportunities to increase efficiencies and reduce service delivery costs for the Town.
- ✓ Recommendations for opportunities to centralize customer service functions in a "Service Cobourg" or similar framework.
- ✓ Recommendations for Customer Service focused training & skill development needs for employees.
- ✓ Recommendations for technology to support initiatives and centralization, including requirements for deployment of a modern CRM System.
- ✓ Development of a phased implementation roadmap including a summary of the work, costs, and resources required to complete each recommended initiative.

Acknowledgement

We would like to take the opportunity to acknowledge the assistance and cooperation provided by staff of the Town of Cobourg and community stakeholders that participated in the development of the Customer Service Strategy Report & Implementation Plan Report. We appreciate that initiatives such as this require a substantial contribution of time and effort on the part of Town employees, and we would be remiss if we did not express our appreciation for the cooperation afforded to us.

II. Report Structure

The report is structured into five main sections: (1) Comparable Municipal and Best Practice Review, (2) Key Findings and Observations, (3) Employee & Customer Consultation Findings, (4) Customer Service Strategy Recommendations, (5) Implementation Planning.

Within each section, there are four main themes to address the specific project needs: (a) Customer-Centric Culture, (b) Service Policies & Measures, (c) Service Operating Model and Delivery, (d) Service Technology, (e) Service Training & Skill Development.

Below is an outline of the report structure.

- 1. Comparable Municipal & Best Practice Review**
- 2. Key Findings & Observations**
 - Customer-Centric Culture
 - Service Policies & Measures
 - Service Operating Model & Delivery
 - Service Technology
 - Service Training & Skill Development
- 3. Employee & Customer Consultation Findings**
 - Employee Survey Findings
 - Customer Survey Findings
- 4. Customer Service Strategy Recommendations**
 - Customer-Centric Culture
 - Service Policies & Measures
 - Service Operating Model & Delivery
 - Service Technology
 - Service Training & Skill Development
- 5. Implementation Planning**

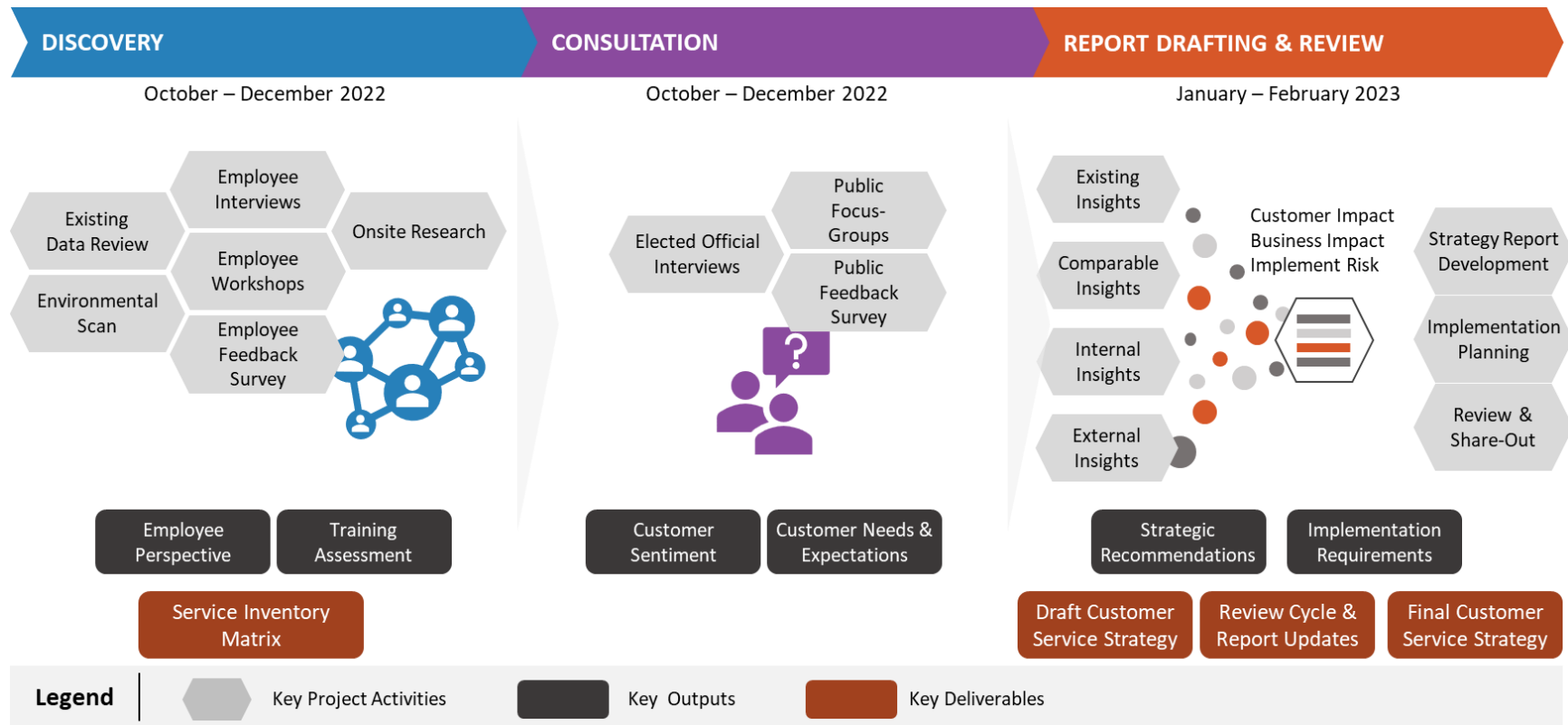
III. Project Overview

It is understood that the Town of Cobourg has identified Customer Service as a priority, and it is committed to continuously improving the customer experience over the long-term. This project conducts a comprehensive review across the entire municipality and develop the Town's first Customer Service Strategy & Implementation plan to make services more transparent, accountable, efficient, and cost effective.

Project Success Requires Meeting Key Goals

- ✓ Identify actionable recommendations that improve Customer Service Experiences and support the organization in delivering the best possible service to meet or exceed customer expectations.
- ✓ Uncover pragmatic opportunities to increase efficiencies and streamline how services are delivered to reduce operating costs and resource requirements.
- ✓ Provide a phased roadmap to support the organization with the knowledge and structure to effectively implement recommended initiatives.

Project Workplan



The diagram above displays the key components of the project workplan for the three stages: 1) Discovery 2) Consultation 3) Report Drafting and Review.

IV. Research Methodology

To help inform the Customer Service Strategy, the consulting team used several internal and external research methods to gather input focused on the Town's customer experience. Several focus groups were held with external stakeholders to provide targeted feedback across various perspectives. A survey was also created both internally and externally to capture data and information from Cobourg residents and employees. In addition, key interviews with Councillors were held to better understand future planning for the area and glean constituent perspectives when it comes to customer service.

Below summarizes the research activities that were conducted. Further details on the internal and external research methodology can be found in Appendix 2.

1. Existing Cobourg Documents, Data, and Insights

- Performed a comprehensive review and analysis of all relevant data and documents obtained from the Town of Cobourg.
- Approximately 10 documents were reviewed that covered topics including previous service reviews, strategic plans, and pulse surveys.

2. Employee Stakeholder Interviews

- Facilitated virtual 1-hour interviews and group workshops.
- 36 internal stakeholders were conducted with Councillors, Senior Managers, Managers, and Front-line staff.

3. Customer Focus Groups

- Facilitated 60-minute virtual customer focus-groups.
- 4 focus groups were conducted that included Business, Tourist, Developer, and Resident groups.

4. Employee Survey

- Deployed a digital Employee Service Feedback Survey for Cobourg Employees.
- 59 employees participated in the survey.

5. Customer Survey

- Deployed a digital Customer Service Feedback Survey for Cobourg Customers.
- 110 citizens participated in the survey.

V. Recommendations Summary

Based on research activities and uncovered insights, 25 recommendations have been developed. The anticipated efficiency and cost savings are “per year” once the recommendations have been implemented for the Town. Estimated implementation costs are one-time costs.

- ✓ **The total estimated efficiency savings for all recommendations range from 6,450 – 9,800+ hrs.**
- ✓ **The total estimated cost savings for all recommendations range from \$220,000 – \$505,000+**
- ✓ **The total anticipated implementation costs for all recommendations range from \$120,000 – \$225,000+.**

The key findings and quantitative figures (i.e., efficiency, savings, and costs) for recommendations are based on the research activities performed within this project as described in section IV Research Methodology. The Town of Cobourg’s current sophistication and maturity level to track quantitative data related to operational service delivery is very low and therefore, available data assessed within the existing data and documents review was limited. Because of this, the CSPN team was required to leverage interview, survey, and anecdotal feedback to fill in the gaps of missing data and arrive at the estimated quantitative figures found in recommendations.

Due to the lack of current quantitative data tracking, estimated figures within recommendations have been outlined in ranges to provide the Town of Cobourg with a directional understanding of the Efficiency Savings, Cost Savings and Implementation Costs associated to recommendations. To obtain a deeper level of detail for these figures, targeted research activities must be performed to track and capture detailed operational data related to service delivery.

Estimated Efficiency Savings (Hrs.): this figure details the estimated *annual* reduction in time / effort hours of employees completing service activities.

- The ranges for these quantitative figures include the following.
 - \$0 - \$10,000
 - \$10,001 - \$30,000
 - \$30,001 - \$50,000
 - \$50,000+

Estimated Cost Savings: this figure details the associated *annual* salary / wage costs reduced in relation to the time / effort hour savings.

- The ranges for these quantitative figures include the following.
 - 0hrs - 100hrs
 - 101hrs - 250hrs
 - 251hrs - 500hrs
 - 501hrs - 750hrs
 - 750+

Estimated Implementation Costs: this figure details the estimated setup costs that require external support or additional resources associated with the implementation of the recommendation. Wage / salary associated with time / effort of employees who would complete recommendations in-house is not considered for the implementation costs.

The following list is a summary of the Customer Service Strategy recommendations. Bolded recommendations represent “Spotlight Recommendations”. These have greater detail than others as per the scope of the project to support the Town in understanding the needs of the recommendation and provide guidance for how they can be executed effectively. Further details into all recommendations can be found within their relative sections of the report.

V.I Recommendations Summary Table

ID	Recommendation Name	Estimated Efficiency Savings (Hrs.)	Estimated Cost Savings (\$)	Estimated Implementation Cost (\$)
1A	Develop Customer Service Vision and Guiding Principles.	N/A	\$0	\$0
1B	Align Service Performance Measurements with Service Standards / Levels.	N/A	\$0	\$0

1C	Develop a Customer Insight & Feedback Gathering Procedure / Processes.	N/A	\$0	\$0
1D	Modify Existing Customer Interaction & Complaint Process (aligned to policy).	500+	\$10,000 – \$30,000	\$0
1E	Develop Internal Employee Service Levels & Standards (similar to customers).	N/A	\$0	\$0
2A	Define a Customer Service Performance Measurement Framework.	N/A	\$0	\$0
2B	Review and Finalize the Recommended Customer Service Policy.	101 – 250	\$0 – \$10,000	\$0
2C	Develop Service Levels & Standards for Individual Departments.	501 - 750	\$30,000 – \$50,000	\$0
3A	Create a “Service Cobourg” Centralized Customer Service Desk.	750+	\$30,000 – \$50,000	\$1,000 - \$5,000
3B	Onboard Two (x2) Additional Customer Service Focused Resources.	N/A	\$0	\$50,000 - \$75,000
3C	Incorporate “Virtual” Meetings into Available Customer Interaction Options.	0 – 100	\$0 - \$10,000	\$0
3D	Close off Individual Department Service Desks within Victoria Hall.	501 – 750	\$10,000 – \$30,000	\$0
3E	Remove Employee Contact Information from Public Facing Sources.	501 – 750	\$10,000 – \$30,000	\$0
3F	Relocate Teams that Interact with Customers to Free-Spaces in Victoria Hall.	101 - 250	\$10,000 - \$30,000	\$5,000 - \$10,000

3G	Modify Services Delivered & Operating Hours at Cobourg Community Centre.	0 – 100	\$0 – \$10,000	\$0
3H	Close In-person Customer Access to Public Works (Building 7).	0 - 100	\$0 – \$10,000	\$0
4A	Design & Deploy a Foundational CRM System for Customer Service function.	750+	\$50,000+	\$10,000 - \$25,000
4B	Conduct a Technology Review / Assessment of Current IT Infrastructure.	N/A	\$0	\$25,000 - \$50,000
4C	Modify Approach to Capturing Service-Related Operational Data & Metrics.	N/A	\$0	\$0
4D	Update Approach & Functionality for SharePoint as a Centralized Repository.	501 – 750	\$10,001 – \$30,000	\$0
4E	Increase Customer Self-Serve Capabilities through Online / Digital Channels.	501 – 750	\$10,001 – \$30,000	\$25,000 - \$50,000
4F	Update Website Structure for Effective Delivery of Key Updates to Customers.	501 – 750	\$10,001 – \$30,000	\$0
5A	Perform Recurring Succession Planning & Resourcing Assessments.	501 – 750	\$10,001 – \$30,000	\$0
5B	Design and Deliver Service-Related Training to the Organization.	750+	\$30,001 – \$50,000	\$5,000 - \$10,000
5C	Modify & Expand on Existing Employee Recognition Program.	N/A	\$0	\$0

V.II Implementation Summary Table

Stage 1: Preparation

ID	Phased Recommendation	Short-Term (1 - 3 Years)				Medium-Term (3 - 5 Years)				Long-Term (5+ Years)				Timeframe (when will it be done)
1A	Develop Customer Service Vision and Guiding Principles	■	■											Short Term
1D	Modify Existing Customer Interaction & Complaint Process (aligned to policy).		■											Short Term
2B	Review and Finalize the Recommended Customer Service Policy.		■											Short Term
3A	Create a “Service Cobourg” Centralized Customer Service Desk.			■	■	■								Short-Medium Term
3C	Incorporate “Virtual” Meetings into Available Customer Interaction Options.			■	■									Short-Term
3D	Close off Individual Department Service Desks within Victoria Hall.				■									Short Term
3E	Remove Employee Contact Information from Public Facing Sources.				■									Short Term
3G	Modify Services Delivered & Operating Hours at Cobourg Community Centre.		■											Short Term

4A	Design & Deploy a Foundational CRM System for Customer Service function.													Short – Medium Term
5B	Design and Deliver Service-Related Training to the Organization.													Short – Long Term

Stage 2: Initiation

ID	Phased Recommendation	Short-Term (1 - 3 Years)			Medium-Term (3 - 5 Years)			Long-Term (5+ Years)			Timeframe (when will it be done)	
3B	Onboard Two (x2) Additional Customer Service Focused Resources.											Medium-Term
2A	Define a Customer Service Performance Measurement Framework.											Short – Medium Term
1B	Align Service Performance Measurements with Service Standards / Levels.											Medium Term
4C	Modify Approach to Capturing Service-Related Operational Data & Metrics.											Short – Medium Term
1C	Develop a Customer Insight & Feedback Gathering Procedure / Processes.											Medium Term
2C	Develop Service Levels & Standards for Individual Departments.											Medium Term
3F	Relocate Teams that Interact with Customers to Free-Spaces in Victoria Hall.											Medium Term

3H	Close In-person Customer Access to Public Works (Building 7).													Medium Term
4D	Update Approach & Functionality for SharePoint as a Centralized Repository.													Medium – Long Term

Stage 3: Expansion

ID	Phased Recommendation	Short-Term (1 - 3 Years)				Medium-Term (3 - 5 Years)			Long-Term (5+ Years)			Timeframe (when will it be done)	
4B	Conduct a Technology Review / Assessment of Current IT Infrastructure.												Medium – Long Term
4E	Increase Customer Self-Serve Capabilities through Online / Digital Channels.												Long Term
4F	Update Website Structure for Effective Delivery of Key Updates to Customers.												Medium Term
5A	Perform Recurring Succession Planning & Resourcing Assessments.												Long Term
1E	Develop Internal Employee Service Levels & Standards (similar to customers).												Long Term
5C	Modify & Expand on Existing Employee Recognition Program.												Long Term

1.0 Comparable Municipal & Best Practice Review

The Comparable Municipality review reflects findings of existing and newly completed reviews of areas like the Town of Cobourg. Targeted municipalities look at population size for both current levels like Cobourg as well as higher levels to understand service capabilities required for the anticipated population growth. Examples of Municipalities focused on for this review include Municipality of North Grenville, Municipality of Clarington, Caledon, Milton, and Sudbury. The findings are organized with the following categories:

- Customer-Centric Culture
- Service Policies & Measures
- Service Operating Model & Delivery
- Service Technology
- Service Training & Skill Development

Customer-Centric Culture

Several municipalities have a Customer Service strategy that promotes a customer-centric culture and is integrated into the corporate strategy. These strategies are documented and shared to help to guide customer service efforts. They outline the strategic vision, principles, goals, and initiatives to provide inspiration and continuous instruction to employees on how best to serve customers. For many municipalities, these strategies focus on providing services that are accurate, timely, and accessible using up-to-date technology and knowledgeable staff. Some of the common customer strategic goals include:

Enhancing the capacity to provide great customer service through staff	Enhancing the capacity to provide great customer service through technology
<ul style="list-style-type: none"> • Meeting customer needs with empathy and kindness. • Creating a customer-centric culture (for citizens, residents, contractors, employees, and anyone who interacts with the organization). • Ensuring staff are knowledgeable to provide accurate, honest, and consistent information. • Measuring performance against existing customer service levels. 	<ul style="list-style-type: none"> • Investing in customer-centric technology. • Establishing tools to respond to customers in a timely and accurate manner.

Service Policies & Measures

Customer service policies act as a reference point for customer facing staff as a guide to delivering customer service. These should be published on public-facing websites to share with customers the quality of service they can expect. Examples of policies include the following:

Service Policies: A few municipalities outlined customer service policy statements that ensure all customer interactions follow common service values. Some service excellence guidelines communicated to staff revolve around common themes of respect, accountability, responsiveness, and ease of customer navigation.

Customer Conduct Policies: Caledon has a Customer Conduct Policy to encourage a positive, safe, and respectable relationship between the Town’s Service Team and their customers. Both customers and staff are responsible for creating a respectful environment. These policies outline what unacceptable behaviour looks like and how it is managed.

Accessibility Policies: Caledon has outlined an accessibility corporate policy to ensure equal access for people with disabilities in accordance with Ontario’s accessibility laws. Staff and volunteers are trained on providing accessible service as it relates to their specific roles. Self-serve kiosks are also made available with accessibility features for people with disabilities.

Service Standards: Peer municipalities have service standards that are attainable and meet the wants and needs of customers. Defining service levels are unique to each municipality and is determined based on resource capacity, organization goals and customer landscape. Several municipalities have service standards that are shared within the organization and published on their website to ensure consistent service delivery. Common guiding principles include delivering customer service that is timely, positive, and accurate.

Below is a table that outlines the Customer Service Standards of numerous municipalities. This comparator analysis is used to define the Customer Service Standards for the Town of Cobourg.

Organization	Telephone	Voice Mail	E-mail	Letters	In-Person
Town of Oakville	3 rings; Update	1 business day for high	End of next business	15 business days	Immediately

	voicemail daily	priority calls; End of next day for medium / low priority calls	day; High priority emails within one business day		
City of Kawartha Lakes	As soon as possible	2 business days	5 business days; Initial response within two 2 business days	5 business days	Immediately
City of Brantford	30 seconds for the main line; 3 rings for the individual line	1 business day	2 business day	10 business days	Timely fashion
City of Toronto	As soon as possible	1 business day	48 hours	N / A	N / A
City of Windsor	As soon as possible	2 business days	3 business days	N / A	N / A
Town of Collingwood	Live	1 business day	5 business days	N / A	10 minutes
City of Greater Sudbury	As soon as possible	2 business days	2 business days	10 business days	As soon as possible
Hastings Highlands	As soon as possible	2 business days	2 business days	5 business days	Immediately
Town of Springwater	As soon as possible	2 business days	2 business days; If more information is required, a full response is to be submitted within 5	5 business days	N / A

			business days		
City of York	20 seconds	N / A	1 business day	N / A	10 minutes

Below is an example of Sudbury’s Customer Service Standard Procedure that is posted on the Municipal website.

Sudbury
Service Standards

Telephone Response Standards

- All telephone calls will be returned within two business days.
- If a full response or resolution is not available, a call will be placed to the customer within two business days to acknowledge and provide information on their request, with a reasonable and appropriate timeline for full response.

Email Response Standards

- Customers will receive a response to emails within two business days.
- Emails that cannot receive a full response within two business days will receive an acknowledgement and a reasonable and appropriate timeframe for full response.

Letter Standards

- All mail that requires a response will be responded to within 10 business days from day of receipt, or an interim communication explaining the reason for the delay will be provided to the customer.

In Person

- Citizens at the front counter will be served as promptly as possible.

Service Operating Model & Delivery

Centralized Model: Many municipalities are moving towards a centralized model that aims to simplify and streamline processes within the organization to increase efficiency and improve service. A common challenge with a decentralized system is multiple entry points of contact that can result in an increase in transfers and duplicate work.

Service Channels: Municipalities have adopted multi-channel service interaction options where they are equipped to deliver foundational service interactions across various channels. Customers can get information through their desired channel including in-person, phone, mail, social media and online. Self-serve capabilities are increasingly used including e-permitting and online payments.

Service Technology

Service technology and tools are integral in providing accurate and complete customer service solutions and can either be employee or customer facing. Municipalities are encouraging self-serve functionality for customers to view accurate information online or through mobile friendly tools. Below outlines some of the common technology and tools used by employees and customers in comparable municipalities:

Employee Facing Tools	Customer Facing Tools
<ul style="list-style-type: none"> • AMANDA 25: Workforce management software • CityWide: Asset management system • Mitel Phone System: Voice over Internet Protocol • Great Plains: Accounting and Financial Management Software • SharePoint: Web-based collaborative platform integrated with Microsoft Office • Vailtech: Tax System 	<ul style="list-style-type: none"> • Email • Phone • City website • Social media • Online forms to report problems and submit feedback. • Online application submissions (development application, volunteer opportunities) • Online permit submissions (building permits, parking permits) • Online license submissions (business licences, marriage licence, road license) • Customer service surveys • Booking tools (facilities, recreational activities, building inspections) • Payment systems (parking ticket payments, property tax and utilities)

Service Training & Skills Development

It is important for staff to be adequately trained with the right skills and knowledge to address customer issues accurately, consistently, and positively. While smaller municipalities didn't have a formalized / standard customer service training roadmap, it is important to have a clear onboarding and development training model.

Municipalities should build a Customer Service Skills journey that leverages the Customer Service Strategy focus areas. Soft skills (such as competencies, behaviors, communication) as well as tactical skills (such as standards, procedures, operating

software) should be included in the training plan to ensure comprehensive learning. Supporting material should be distributed such as job-aids and templates that customer service staff can reference.

Training to support Centralization: In the Town of Caledon, Service staff were cross trained to support their centralized service model. As departments were training on supporting a centralized service model, an employee from each department was designated as the “Subject Matter Expert”.

2.0 Key Findings & Observations

The following section provides an overview of the key findings and observations uncovered through primary and secondary research sources. The findings organized into the four Strategic Key Themes as identified in section II. Report Structure.

2.1: Customer-Centric Culture

A customer-centric culture places the customer as the focal point of all decisions related to service delivery. Within the municipal context, the broad definition of ‘customer’ relates to residents, businesses, tourists, and any individual or group that interacts with the Town. The following key findings and observations are highlighted for Customer-Centric Culture.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Diversity, inclusion, equity, and accessibility (IDEA) has become a focus for the Town in recent years. The Town has developed an Equity, Diversity, and Inclusion Strategy and are currently within first phase <i>Internal Strengthening of Equity, Diversity, and Inclusion</i>. • Cobourg has many natural, historic, and cultural attractions that attract tourism to the area. Yet, tourism is not being used effectively as a source of revenue for the Town. Tourism is a great opportunity to expand the generated revenue for the Town to help fund improvements that will meet the current and future growth demands. 	<ul style="list-style-type: none"> • No formal Customer Service Strategy has been created to guide the organization and workforce towards common service goals and behaviours. There is a lack of ‘customer service mindset’ to prioritize the customer experience and it is not a consistent priority across the organization. • Equal treatment of customers is not being seen consistently across the organization. Customer service quality differs (unknown if it is explicit or not) based on the demographic characteristics (e.g., socioeconomic status, age, etc.) of the customer. Further opportunities have been identified to increase the level of cultural competency and inclusive service delivery.

	<ul style="list-style-type: none"> • Tourism function is located within the Cobourg Community Centre. This location minimizes the presence and access to the Tourism office to the community and tourists. • Employee experience within the Town is rated low to moderate according to the employee survey. Approximately 50% of staff believe that the Town is open to change. • Formalized expectations of how internal employees should treat each other should be improved. Collaboration between employees has been stated as an area of improvement. Employees should be considered as internal customers and treated with the same customer-centric mindset as external customers.
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2.2: Service Policies & Measures

Customer Service policies and frameworks build the foundation of articulating and striving for great customer service. This foundation creates a shared understanding and expectation of service, while collecting the right metrics allows for the organization to track progress. The following key findings and observations are highlighted for Service Policies & Measures.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Desire and leadership support for using a data-driven approach to decision-making. This interest allows for greater adoption and use of metrics within the organization. 	<ul style="list-style-type: none"> • There is no formal Customer Service Policy to define and guide what acceptable levels of service are at the Town. No service standards / levels or metrics are defined or measured.

	<ul style="list-style-type: none"> • No service measures are consistently being tracked leading to little understanding of current service levels. This leaves the Town vulnerable to adequately resourcing service demands. More insight would allow the Town to make data-driven arguments for changes, such as adjusting staffing levels or implementing process improvements. • There is limited ability to effectively track metrics with the current tools (processes, technology, roles). There is room to improve automated systems to track or report on metrics. Data or feedback is minimally used by leadership to inform decisions or is not a common practice across all departments. • There are no formal internal Customer Service Policies to guide what acceptable levels of service are between employees in the Town.
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2.3: Service Operating Model & Delivery

The Town’s current Service Operating Model and Delivery leverages many service channels, delivered out of several facilities. The following section will provide an overview of (1) the service channels and processes provided and (2) a review of the Town’s six main service facilities.

The Town of Cobourg offers a comprehensive list of services to the community and different stakeholder groups. For reference, a complete list of the Town of Cobourg Service Inventory can be found throughout the departmental sections as well as cumulative list in Appendix 4.

Service Channels & Processes

Overall, services are offered across multiple channels including the following:

In-person	<ul style="list-style-type: none"> • Customer service desks are available in the Victoria Hall, Public Works Building, Cobourg Community Centre, Venture 13 Building, Firehall, Marina and Campground. • Customers can make inquiries or provide feedback on first-come-first-serve basis. • Various services are available to customers including making payments, applying for permits, resolving issues, and making general inquiries. • No formal appointments are available.
Phone	<ul style="list-style-type: none"> • A directory of phone numbers is available on the website where customers can contact individual departments and employees. • There are multiple phone lines available to individual departments.
Email	<ul style="list-style-type: none"> • Individual employee emails are available online. • A general email intake form is available to contact the Town.
Letter	<ul style="list-style-type: none"> • The mailing address and fax number are available on the website for customers who desire this method of service.
Social Media	<ul style="list-style-type: none"> • Customers can view and interact with Town posts on various social media platforms including Facebook, Twitter, Instagram, YouTube, and LinkedIn. • There are separate Facebook and Twitter accounts for: The Town, Tourism, Community Centre, Transit (just Twitter), and Victoria Hall (just Facebook). There are separate Instagram accounts for the Town and Tourism.
Self-Serve	<ul style="list-style-type: none"> • The website is available for customers to find information through self-serve. • There are additional self-serve capabilities such as paying taxes purchasing / paying for parking tickets.

Below are key observations highlighted for the service channels and processes:

Strengths	Weaknesses
<ul style="list-style-type: none"> • Customers have access to various channels to accommodate their preferences when interacting with the Town. • There is an online complaints tool available for customers to submit their input through the website. • Self-serve tools are available for customers on the website to find information, pay taxes and apply to certain applications. 	<ul style="list-style-type: none"> • Service delivery is not consistent or standardized across channels. There are varying degrees on what tasks customers can complete across channels due to limitations in technology tools. For example, not all applications can be submitted online. • Processes are not formally defined or documented across departments resulting in increased effort, confusion, and inconsistencies in service delivery due to uncertainty on how to complete tasks. • Information sharing between departments and management levels is limited. Customer-facing roles do not always have the necessary information to answer customer queries leading to unresolved issues or increased transfers. • Internal and external communications are co-ordinated through a single resourced communication team. This can include internal / external communications, website management, and digital communications. There can be tight turnaround times for content reviews and delays in collateral release when managing multiple priorities. • Phone, email, and in-person transfers between departments are common due to customers

	<p>contacting the incorrect team. Customers are often unsure of which department to contact for specific inquiries.</p>
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Service Facilities

The Town of Cobourg is divided into multiple buildings and facilities including Victoria Hall, Cobourg Community Centre, Public Works, Marina and Campground, Venture 13, and the Firehall. Below are key observations highlighted for each of the service facilities.

Victoria Hall

Victoria Hall is a multi-functional building that is utilized as office space for Cobourg employees and open to the public for general inquiries and utilization of the Town Concert Hall, Courtroom, and the Art Gallery of Northumberland. There are five customer-facing service desks located by the Office of the CAO, the Finance department, Planning department, Concert Hall, and Art Gallery. A separate building is located next to Victoria Hall and is used by the DBIA and Law Enforcement as additional office space.

Strengths	Weaknesses
<ul style="list-style-type: none"> • The building is a historic site that is used by the Town employees and as a revenue-generating tourist attraction. • The building is located on a main street in downtown Cobourg that is easily accessible to residents. • There are existing plans to renovate the building next to Victoria Hall. The space will be fully utilized by the By-Law department and will be open to the public for general inquiries, appointments, and ticket disputes. • There is an opportunity to fully utilize space in the basement and 	<ul style="list-style-type: none"> • The main lobby does not have a front desk and a lack of effective signage that causes confusion among customers who are unclear on where to find specific departments. • There is no dedicated customer service function. Instead, customer-facing responsibilities are assigned to individual departments. Staff from various departments collaborate to deliver customer facing roles in addition to completing their main job responsibilities. This causes a lack of focus of resources due to competing priorities.

<p>reorganize departments that require extra space. There are rooms that are filled with documents and records that can be stored in the library to make room for desks / offices. There are several rooms that are not used altogether.</p>	<ul style="list-style-type: none"> • Several departments do not have adequate office space as multiple departments share a common space. This is especially prominent for the HR department that require sensitive discussions. Some workspaces are inadequate for the role / activities being performed (i.e., managers with ability to close door). • There is high-foot traffic due to the Concert Hall and Art Gallery attracting residents and tourists that can be distracting for Town employees who share the building.
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Cobourg Community Centre

The Cobourg Community Centre (CCC) delivers numerous activity services to the public including a Seniors activity centre, fitness programs, ice rinks, gymnasium, and outdoor recreational facilities. There is a front desk with two administrators who assist customers with membership management, bookings, and general inquiries. The CCC also manages the execution of the tourism initiatives.

Strengths	Weaknesses
<ul style="list-style-type: none"> • The building is a large and newly established 142,000 square foot facility. • They offer numerous facilities including two ice rinks, meeting rooms, a gymnasium, track, Seniors Centre, food and beverages services, adult, and child programs. • They offer outdoor recreational facilities and event space used by community groups. 	<ul style="list-style-type: none"> • A small number of employees manage multiple functions. For example, there are two receptionists who manage activity bookings, customer memberships, tourist inquiries and parks bookings. • The CCC manages both community Centre and tourism functions. This location minimizes the presence and access to Tourism to the community and tourists.

	<ul style="list-style-type: none">• Service volumes fluctuate throughout the day that make it difficult to manage service levels. For example, the CCC receives heavy foot traffic during the mornings and evenings when activities / sessions are being run.• There are difficulties running operations with the current staff levels. There are two front desk administrators that manage both telephone, email and in-person inquiries. This can cause delays in answering customer questions when administrators are occupied while managing different channels.• The building is siloed from customer service functions in the Town Hall which causes communication issues between teams. This was cited by numerous employees that have dealings across the two facilities.• There are security issues due to a lean staff model. The maintenance crew has difficulties managing the entire building with current staff levels.• Maintenance staff can take on a customer service role due to customers asking them questions. This is especially the case during opening and closing hours when there is only 1 – 2 staff available throughout the facility. This is a challenge when maintenance staff do not have the time or knowledge to answer customer queries. Maintenance
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	<p>staff should be meant to supplement customer service, but it is not their main responsibility. The Town is requiring them to sometimes be the only Customer Service resource in the Community Centre while also performing their maintenance duties.</p>
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Public Works and Parks (Building 7)

The Public Works division is responsible for a variety of services including Engineering, Transit, and Parks Operations. There is a front desk with an administrator by the entrance where customers can ask questions or organize to meet individual employees. Due to the building being physically located away from other municipal buildings, Public Works receives less foot traffic than other municipal locations.

Strengths	Weaknesses
<ul style="list-style-type: none"> The building provides an appropriate space to deliver services. 	<ul style="list-style-type: none"> The building is physically located away from other Municipal buildings and facilities. Customers seeking in-person services are either not aware of its presence or go to the incorrect location. The building is located away from customer service functions in the Town Hall which causes communication issues between teams. Front-line staff have customer-facing roles when residents ask questions as they are working on-site. This is a challenge as they do not have access to the level of knowledge to answer customers.

Marina and Campground

The Marina and Campground are located by the waterfront. There is a building by the marina that is open to the public with two working stations available for customers to make bookings, payments, and ask questions. Staff are available on-site to assist customers with boating and campground needs. The Marina and Campground see the highest number of visitors during the summer months.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Students are hired to accommodate seasonal fluctuations. This is beneficial to manage high demand months in the summer. • They offer outdoor space for events and activities that can attract residents and tourists. • This is a strong revenue generator from boaters and tourists who utilize facilities. 	<ul style="list-style-type: none"> • The Dressler building (previously dedicated to support tourism) has been repurposed and is no longer dedicated to support tourism initiatives. As a result, many tourist-related questions are directed to employees at the Marina and Campground. • There are seasonal fluctuations that make it difficult to adequately staff roles. Summer months require greater resources to accommodate the high level of tourists. • There is no dedicated resource focused on customer service. Employees have shared responsibilities between the on-site activities and the marina building. Outdoor facilities can be difficult to maintain the level of quality as resources are not always available to manage on-site activities on the docks and campgrounds. • Employees must manage difficult customer situations. This is especially the case in the summer when tourism is high. • An Us vs. Them mentality is present among residents and

	visitors. There can be a separate treatment of both groups by employees. Some town stakeholders and residents would prefer tourism be decreased as they feel that the influx in people only adds to more congestions and garbage / noise pollution.
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Venture 13

The building is utilized as a coworking space and event space by the public. There is a front desk that is managed by an administrator who assists in the set up / facilitation of events, manage event bookings and co-working memberships. The Economic Development Team is also located in the building.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Venture 13 offers a unique service to customers and entrepreneurs. • There is a potential to promote entrepreneurship and create town business. 	<ul style="list-style-type: none"> • The building is located across from the CCC and away from other municipal buildings. Customers are not aware of the purpose and use of the building. • The Economic Development team is in the Venture 13 building. The location is not as easily accessible, and customers are unaware that it exists in the building. • The building is located away from the customer service function in the Town Hall. Communicating information can be challenging without the proximity of services. • The Economic Department is located away from the Planning department in the Town Hall. This makes it more difficult for teams to collaborate with each other. Customers have also stated siloed departments as a pain

	point. It is difficult to contact employees from multiple buildings.
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Firehall

The Fire Department provides 24-hour emergency services. The Firehall has a front desk behind an auto-locked door that is managed by an administrator.

Strengths	Weaknesses
<ul style="list-style-type: none"> Offers essential services to the community including emergency services, fire prevention services, permits, inspections and public education, and general advising. 	<ul style="list-style-type: none"> The team is located away from customer service functions in the Town Hall which causes communication issues between teams. Social media and outgoing communications collateral is managed through the Communications Manager. This can cause misinformation to be shared with the public as they do not have the same level of knowledge. There is a lack of a call and permit tracking system.

2.4: Service Technology

Cobourg’s IT infrastructure consists of multiple technology programs and systems that are corporate-wide and unique to each department. These tools include both internal (employee-facing) and external (customer-facing) solutions. The chart below summarizes the internal and external tools the Town currently uses.

Internal	External
<ul style="list-style-type: none"> Vailtech (accounting / tax tool) AIMS (permits + tickets) Great Plains CityWorks 	<ul style="list-style-type: none"> Municipal Website Online tax and ticket payment system Report a Problem Tool

<ul style="list-style-type: none"> • SharePoint 	<ul style="list-style-type: none"> • Customer Service Feedback / Compliment • Social Media Platforms • ActiveNet • HMS • Box Office
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The following key findings and observations are highlighted for the Service Technology:

Strengths	Weaknesses
<ul style="list-style-type: none"> • The Town offers some online and self-serve capabilities on the website including select payment options and online applications. • There are multiple channels to interact with services through online, social media, and email channels. 	<ul style="list-style-type: none"> • There is minimal customer information being tracked to understand volume, details, and status of interactions with the Town across departments. Service volumes are either being tracked manually with in-house tools (.XSL) by specific departments or not tracked at all. • There is a lack of knowledge on municipal information including ongoing projects, roles, and responsibilities. SharePoint is underutilized as a central repository of information and many employees have stated difficulties navigating the tool. • The Town does not have a dedicated person to update the website. The communications team is responsible for making website updates which adds to the team’s workload. • The Town has multiple websites and social media platforms that customers have stated are confusing. For example, the CCC has a website and social media

	<p>presence that is separate from the main municipal website.</p> <ul style="list-style-type: none">• Tools and systems are not being leveraged as efficiently as possible. For example, CityWorks has customer management functionality that is underutilized.• Customers must complete a lengthy and manual process to submit permits and applications. Customers must download permits and applications through the municipal website, complete appropriate forms and return completed forms through email or in person.• Not all departments have a platform to manage digital applications. For example, the Planning team has 15 different application types that are managed manually with paper copies.• Email is the primary form of communication used by the Town between staff and with applicants. A notification system of application status would be helpful in managing workflow and application cases.• Navigation of the website and information found within it does not always meet customer needs. Some information is not updated, for example, the CCC Operating Hours are not accurately displayed on the website. This causes customer confusion and increases the volume of contacts
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	<p>into the town for customers to get the information they seek.</p> <ul style="list-style-type: none"> • The payment process for multiple departments is manual. It is common to only accept cheques from customers when making payments. It would be beneficial to expand payment options to include the ability to make payments online.
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2.5: Service Training & Skill Development

Customer service training and coaching provides employees with the right knowledge, skills, and confidence to deliver services at their best. The following key findings and observations are highlighted for Service Training & Skill Development:

Strengths	Weaknesses
<ul style="list-style-type: none"> • Lean organization allows for individuals to be cross trained. • Some corporate training exists through HR Downloads and department delivered training. Recent or upcoming topics that have been promoted by the Town are Dealing with Difficult Customers and Anti-Racism training. Although no formal or comprehensive customer service training is provided, there is opportunity to expand on current processes. • Investment in training increases employee’s knowledge and skills to perform their work. Training improves work outcomes, such as increased productivity and accuracy of work while 	<ul style="list-style-type: none"> • Employees desire more opportunities for training and development as indicated in the most recent employee pulse survey. Anecdotally, employees have strong soft-skills, and more training needs to be focuses on technical skills and processes/procedures. Employees cite that minimal training is provided when new systems or tools are introduced in the workplace. More training is needed to ensure employees have the knowledge and skills they need to leverage the full functionality of the tools provided and that they are used consistently across the organization.

<p>decreasing the need for escalations, re-work, or interventions. In addition, employees who are supported in their personal and professional development tend to have higher organization commitment and intent to stay. Investment in employees is crucial for lowering absenteeism and turnover.</p>	<ul style="list-style-type: none">• Scheduling ongoing training is difficult with the need to upkeep service delivery within lean teams.• Employees have low perceptions of career advancement opportunities within the Town.
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3.0 Employee & Customer Consultation Findings

Throughout the duration of the project, CSPN conducted employee and customer research to understand the current state of customer service at the Town from multiple perspectives. The insights were used to inform the service review and recommendations within this report.

CSPN conducted the following research, where the results are summarized within the above findings and survey results below:

- 26 Employee Interviews (36 participants)
- 1 Employee Customer Service Survey (59 responses)
- 4 Customer Focus Groups (12 participants)
- 1 Customer Service Survey (110 respondents)

3.1: Employee Consultation Findings

Insights were obtained through the deployment of an employee survey and facilitation of employee interviews and group workshops. The survey was available digitally for all employees to complete and aimed to capture insights from the Town of Cobourg employees on their experiences of providing service at the Town. These findings were used to guide the qualitative findings addressed in the report. This section outlines the survey results.

Employee Survey Summary of Key Findings

The survey conducted focused on employee insights and gathered internal perspectives regarding municipal customer service delivery. Further detail into the design and administration of the survey can be found in Appendix 2. The survey data analyzed is based on 59 participant responses.

The following key findings and observations are highlighted for the Employee Survey:

Overall Findings	<ul style="list-style-type: none">• 100% of respondents stated that Customer Service is Important or Fairly Important.• The biggest gaps in support identified by respondents include:<ul style="list-style-type: none">○ Collaborating with other departments to complete customer requests (22.42%)○ Handling customer complaints (20.69%)○ Communicating / updating employees on the status of tasks being completed for a customer request (19.7%)
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<p>Desire to Improve Training</p>	<ul style="list-style-type: none"> • Skills that respondents stated are most helpful to get extra training on to deliver great customer service include: <ul style="list-style-type: none"> ○ Handling difficult situations / people (37.93%) ○ Understanding the services available and how they are delivered across departments (36.21%) ○ Using internal tools and systems effectively (36.21%) • 62.07% prefer in-person classroom training.
<p>Desire to Minimize Manual Tasks</p>	<ul style="list-style-type: none"> • 58.93% of respondents said that there are activities with their job that are very manual and time consuming. • Current processes that are time consuming includes recording transactions, taking bookings, and managing customer information. • Searching for information is time consuming due to the unorganized information database and records. • Employees often answer repetitive customer questions that could be resolved by self-serving online.
<p>Processes and Procedures are Unclear</p>	<ul style="list-style-type: none"> • Due to a lack of guidelines, employees do not have the knowledge and tools to manage difficult customers / situations. • Due to a lack of corporate standards and policies, there is no collective understanding of expectations when responding to customers and managing voicemail. • There are undefined processes around managing absences and vacations while maintaining appropriate customer service levels. • There is a lack of understanding of roles and responsibilities where it is unclear which departments to direct customer inquiries to. Front line staff forward questions to the incorrect level of management. • There is no consistent process to use internal tools such as SharePoint, Teams, and Microsoft Suite.
<p>Desire for Technology Improvements</p>	<ul style="list-style-type: none"> • Tools such as CityWorks and SharePoint are not used efficiently due to a lack of understanding on how to fully utilize features. • Departments such as Planning desire computer access at the customer counter to assist in answering customer queries. • The website is difficult to navigate and does not have updated information.

	<ul style="list-style-type: none"> • There is a lack of digitized solutions where employees have to hand-write receipts, process paperwork and forms, complete time sheets and manage customer cheques.
<p>Desire to Improve Cross-Department Information Sharing</p>	<ul style="list-style-type: none"> • 26.86% of respondents stated that information sharing between departments should be improved. • 25.84% of respondents stated that communication between departments should be improved. • There is a lack of information being shared across departments and divisions. • There is a lack of a central repository of information due to SharePoint being underutilized. Currently information is diffused across various tools that make it difficult to find the necessary information to deliver customer service. • There is a consensus that communication / collaboration across teams can be improved.
<p>Desire for Centralization</p>	<ul style="list-style-type: none"> • Employees desire a centralized customer service team to answer common questions including online payment system for applications, zoning compliance letters, building permits, etc. • There are too many building and phone numbers that are confusing for customers. This often results in customers getting transferred after contacting the incorrect department.

3.2: Customer Consultation Findings

A customer survey was created to capture data and information from Cobourg residents and tourists. The survey was available through digital channels to capture insights from the residents and tourists of Cobourg on their experiences when interacting with the Town. These findings were used to guide the qualitative findings addressed in the report. This section outlines the survey results.

Customer Survey Summary of Key Findings

The survey conducted focused on customer insights and gathered residents’ perspectives regarding municipal customer service. Further detail into the design and administration of the survey can be found in Appendix 2. The survey data analyzed is based on 110 participant responses.

The following key findings and observations are highlighted for the Customer Survey:

Overall Findings	<ul style="list-style-type: none"> • 47.67% of respondents are either satisfied or very satisfied with customer service provided by the Town. • 66.05% of respondents believe that it is important to have one point of contact when interacting with the Town. • Email is the preferred channel when interacting with the Town, followed closely by phone. Though there are many customers who still prefer in person interactions. • The greatest issues customers have been facing are long delays / no responses, unclear or unavailable information and confusing / inconsistent processes.
Customer Receive Delayed or No Reponses at All	<ul style="list-style-type: none"> • 67.90% of respondents expect to be connected to a representative in under 2 minutes. • 83.11% of respondents expect their emails to be responded to within 24 hours. • The biggest gaps in customer service identified by customers are resolving issues effectively (28.7%), timely (26.17%) and with empathy (29.9%). • The most important employee characteristic customers expect when interacting with the town is resolving their issues effectively. This is followed by knowledgeable staff, timeliness, and professionalism.
Information / Processes are Unclear	<ul style="list-style-type: none"> • Processes (such as parking laws) are unclear. • Staff have been unable to resolve all customer issues. • There are inconsistencies in processes, response times and treatment between departments. • There are lengthy delays when applying for permits. Customers are unclear on the timelines. • Customers are unclear who to contact for specific concerns.
Desire to Improve Self-serve Functionality	<ul style="list-style-type: none"> • 13.76% of respondents prefer to complete tasks completely independently with full self-serve functionality. 13.76% of respondents prefer a fully guided service where staff members guide the process / service experience. • 25.69% of respondents stated that the website is difficult or very difficult to use. • There is a common customer sentiment that the municipal website is difficult to navigate and obtain desired information.

- Building permits are difficult to obtain. The online system is confusing to customers.

4.0 Customer Service Strategy Recommendations

The following section provides recommendations to improve customer service delivery at the Town. The recommendations are organized into the four Strategic Key Themes as identified in Section 2.0. Report Structure.

4.1: Customer-Centric Culture

A customer-centric culture places the customer as the focal point of all decisions related to service delivery. Within the municipal context, the broad definition of ‘customer’ relates to residents, businesses, tourists, and any individual or group that interacts with the Town. The following recommendations seek to build the foundations of a customer-centric culture at the Town.

ID	Challenge	Recommendation	Value / Benefit
1A	Lack of a customer-centric mindset and definition of what levels of customer service should be provided by the Town.	<p>Develop Customer Service Vision and Guiding Principles. Leverage customer desires / expectations, organizational commitments, charter promises, brand attributes, etc. to align how Cobourg Customer Service wants to be perceived by customers with the overall Town brand. Key elements to a Customer Service Vision include the following.</p> <ul style="list-style-type: none"> • Visual CX Vision “Poster” • Vision Statement • CX Pillars / Goals • Actions, Activities, Behaviours, etc. (for each Pillar) • Performance Measures / Metrics (for each Pillar, Action, Activity, Behaviour, etc.) 	<ul style="list-style-type: none"> • Provide employees and customers with clear understanding of the Town’s priority and commitment to customer service. • Help embed customer service principles within every role at the Town. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: N/A • Implementation Cost: \$0 (complete in-house)
1B	Low employee morale in relation to ongoing performance	Align Employee and Customer Service Performance Measurements with Customer Service Strategy and Standards / Levels.	<ul style="list-style-type: none"> • Ensure high engagement among employee groups and identify areas of

	management and training opportunities.		improvement or support. Financial <ul style="list-style-type: none"> • Cost / Efficiency Savings: N/A • Implementation Cost: \$0 (complete in-house)
1C	Limited insights into customer satisfaction levels and understanding their needs / wants.	<p>Develop a formal customer insight gathering procedure and processes to solicit customer feedback / satisfaction.</p> <p>Key elements include the following:</p> <ul style="list-style-type: none"> • A singular tool to capture and house customer feedback (i.e., SurveyMonkey, Qualtrics). • A formal deployment plan for when these insights will be captured (i.e., monthly, quarterly, annually). It is recommended to complete annual at the very minimum. • A formal question-set of what customer insights / feedback wanting to be captured (this “Set” is used for every deployment to get trend / longitudinal data) • Key metrics to track include: <ul style="list-style-type: none"> ○ Customer Satisfaction Score (CSAT) – overall and for individual services. ○ Net-Promoter Score (NPS) ○ Customer Effort Score (CES) 	<ul style="list-style-type: none"> • Understand what customers value and improve organizational service delivery to align customer needs. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: Potential to decrease effort from all ad hoc surveys being completed currently. • Implementation Cost: \$0 (complete in-house)

		<ul style="list-style-type: none"> ○ Customer Preferences ○ Customer Needs & Expectations ● A procedure for who is responsible for producing a report based on the findings and what the expectations are for acting on the findings. ● <i>Note: it is important that there is alignment of the CRMs ability to capture these metrics where applicable.</i> 	
1D	Customers are not always treated the same and can get preferential treatment by employees depending on the customer “characteristics” or “type”.	<p>It has been cited by numerous employees that customers can receive varying levels of service based on aspects such as if they’re tourists, if there is a language barrier, if they know the employee, if they have different cultural backgrounds, etc.</p> <p>This should not be the case and to prevent the potential of customers getting “preferential treatment” it is recommended that Cobourg modify existing customer complaint process to clearly define a complaint (versus feedback), define a clear escalation and debriefing process, and align with EDI and Accessibility commitments.</p>	<ul style="list-style-type: none"> ● Increase accountability to Customer Service Policy ● Increase accountability to EDI and Accessibility commitments. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> ● 500+ hrs through the streamlining of processes. <p>Financial</p> <ul style="list-style-type: none"> ● Cost / Efficiency Savings: \$ 10,000 – 30,000 ● Implementation Costs: \$0 (complete in-house)
1E	There are no defined internal employee service levels / expectations.	Develop internal employee service levels and standards that are similar to / aligned with the newly defined customer service levels and	<ul style="list-style-type: none"> ● Customer Service Policy, standards, levels, EDI, and Accessibility expectations are

		<p>standards within this Customer Service Strategy.</p> <p>Service standards / levels defined for customers should also reflect interactions between employees. These do not have to be the exact same but there needs to be a formal policy for employee service interactions, not just customers.</p>	<p>extended to internal employees.</p> <ul style="list-style-type: none"> Customers and Employees are treated with same level of equitability. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: N/A Implementation Cost: \$0 (complete in-house)
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4.2: Service Policies & Measures

A well-defined Customer Service policy and measurement framework provides employees and customers with a clear understanding of expectations. A policy acts as an agreement to guide the way the employees and Town approach customer service, whereas having the right metrics in place helps the organization track current and future areas of success or improvement. The following recommendations seek to provide the Town with a clear, accountable framework for customer service.

ID	Challenge	Recommendation	Value / Benefit
2A	Minimal insight or measurement of performance to guide long-term strategies.	<p>Define a Customer Service Performance Measurement Framework aligned to Corporate KPIs (including technology solution and governance).</p> <ul style="list-style-type: none"> Leverage the recommended customer feedback and operational metrics to build a “score card” that can be reported on to track / measure 	<ul style="list-style-type: none"> Appropriately identify and plan for operational improvements to meet Council and Community expectations. Align metrics with Customer Service Vision / Goals (when defined) to have a way of measuring performance and progress.

		<p>progress and performance against overall Customer Service goals at the Town.</p>	<p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: N/A • Implementation Cost: \$0 (complete in-house)
2B	No Customer Service Policy exists.	<p>Review and finalize the proposed Customer Service Policy. Facilitate a “Roadshow” to share-out and inform the new policy to all employees.</p> <ul style="list-style-type: none"> • The recommended policy with service levels / standards can be found below. <p>(Spotlight Recommendation: further detail into this recommendation can be found below)</p>	<ul style="list-style-type: none"> • Decrease amount of time / effort spent on addressing customer inquiries. • Provide transparency of acceptable customer service levels and actions <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 101-250 hrs through the streamlining of processes. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 - \$10,000 • Implementation Costs: \$0 (complete in-house)
2C	No Customer Service Standards exist the department level.	<p>Develop department-level service standards for all department processes (responsibility to be maintained by each department). Individual departments have unique and differentiated operations, therefore it is not appropriate to demand that their service standards are identical. It is important to allow for departments to make modifications to these</p>	<ul style="list-style-type: none"> • Manage customer expectations for specific tasks or activities and increase accountability. • Increase transparency of appropriate processing times. • Decrease time / effort of employees’ collaboration time with colleagues due to confusion on who is

		<p>levels to ensure they can be met on a consistent basis.</p> <ul style="list-style-type: none"> • Leverage corporate standards to tailor to individual departments. 	<p>responsible to complete what tasks.</p> <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 501 - 750 hrs. achieved through the streamlining of processes. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$30-000 - \$50,000 • Implementation Costs: \$0 (complete in-house)
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Spotlight Recommendation: Cobourg’s Customer Service Policy

The Town of Cobourg is committed to providing the best possible customer service to our residents, partners, and visitors. The Town employees are here to make sure programs and services are accessible to everyone. The Town prides themselves on the desire and ability to help our customers.

Note: it is important that the Town of Cobourg begin to measure their ability to meet these targets and score their performance to ensure that it is realistic to achieve before they make these figures a public commitment to the community.

Key Town employee commitments include:

- Town employees help customers solve problems through providing accurate and timely information. It is important that The Town provides service that is consistent and reliable so that it always meets customer expectations. **Employees are here to help.**
- Town employees will deliver services in a way that is kind and personable. Town employees listen and are empathetic to your concerns and seek to resolve them in a friendly and professional manner. **Employees treat every customer with respect.**
- Town employees will make certain that all Town services and programs are available to all residents. Town employees will help remove barriers to service and ensure all residents have access to the services they need. **Employees treat every customer equitably.**

- Town employees will treat internal colleagues with the same respect, professionalism, and kindness that is afforded to external customers. The same treatment that customers received is expected to be received by employees at the Town.

To ensure that all interactions are conducted in an appropriate manner, the Town promises to upkeep the following Customer Service Standards:

In-person

- All customers will be acknowledged politely and professionally when entering any Town facility.
- Appropriate service, direction, or information will be provided in a timely and courteous manner.

Telephone & Voicemail

- All telephone calls directed to Service Cobourg will be answered within 60 seconds by a Town employee.
- Service Cobourg will assist customers if possible or will provide callers a warm transfer to the correct role. Callers will not be transferred to another line or voicemail without being made aware. Customers calling the correct area will have their issue resolved by involving as few Town staff as possible.
- In the case that a telephone call is missed, all telephone calls (from both internal and external customers) will be returned within one business day.
- Personal voicemail greetings will be courteous, informative, and will direct the caller to leave a detailed message.
- Vacation or absence messages will be activated and will provide a back-up contact name and information while out of the office.

Email

- All emails will be acknowledged within 48 hours.
- Vacation or absence messages will be activated and will provide a back-up contact name and information while out of the office.

Social Media

- All social media inquiries that require Town response (e.g., complaints or inquiries) will be acknowledged within 2 business days of receipt. An acknowledgement means that there is a reply to the inquiry and does not mean that the interaction has been resolved / closed.

Written Correspondence

- All written correspondence (i.e., postage, fax, hand delivered messages) will be stamped with a 'Received' date stamp on the day that it is received by the Town.
- Written correspondence that requires a response will be acknowledged within 5 business days. If no contact information has been provided, and acknowledgment will be given to the customer as soon as possible. In the events that the employee requires more time to respond, an explanation will be provided, and an official response will be provided within 15 business days.

Meetings and Public Consultations

Internal Meeting Requests

- All Town appropriate meeting rooms / facilities / conference spaces must be added to outlook calendars so that their availability can be viewed, and individual rooms can be scheduled / booked by everyone across the organization.
- All Town staff members are required to keep their work-related outlook calendars up to date.
- All in-person and virtual meetings are to be sent via digital request (for example MS Teams/Outlook). When sending a meeting request include the location, time, and a short meeting brief explaining the purpose of the meeting.

External Meeting Requests

- Town employees are responsible for managing and booking all meetings with customers.
- The meeting organizer is responsible for ensuring the meeting room is booked in advance. The meeting organizer is to include Service Cobourg within the meeting invite to coordinate with the appropriate facility if there are incoming calls and/or notify of arrival when at Victoria Hall.
- If the Town's IT department is required to set up equipment, a minimum of 48-hours in advance will be provided through the IT ticket system.

Public Consultations (formal meetings, townhalls, and/or events with external stakeholders)

- All Town public consultations must be advertised a minimum of 2-weeks prior to the event date.
- All public consultations must be accessible to all members of the public. When possible, virtual accommodations are to be made for all consultations.
- When a study solicits public consultation, the public will be provided the outcomes or decisions of the study.
- If the Town's IT department is required to set up equipment at any facility, a minimum of 48-hours advance-notice will be provided with the specific IT requests.

- When employees are representing the Town at a meeting or event outside of the organization, employees are expected to represent the Town in a positive, respectful manner and provide the same levels of customer service as they would when they are performing their regular duties as references within the Town of Cobourg Code of Conduct Policy.

Complaint Process

- If customers are dissatisfied with the services received, they are required to submit a written complaint using the online form. All complaints are to be acknowledged within 48 hours.

Accessibility

- If a customer requires accommodations or an accessible format to communicate or complete the service, employees will work with the customer to meet those needs.
- In the case that the accommodation cannot be made at that time, the customer will be informed and provided a follow-up with an alternative solution.

Customer Service Standards / Levels

	Telephone	Voice Mail	E-mail	Written	In-Person
Town of Cobourg	60 seconds (as soon as possible at high-volume peaks)	2 business days	2 business days	5 business days	Immediately or 10 minutes

4.3: Service Operating Model & Delivery

The Service Operating Model recommendations outline the key areas for the Town to move towards centralized and customer-centric service delivery. The following recommendations seek to provide the Town with centralized customer service delivery model.

ID	Challenge	Recommendation	Value / Benefit
3A	Customer inquiries / complaints come into the Town from	Create a “Service Cobourg” centralized customer service desk at Victoria Hall.	<ul style="list-style-type: none"> • Eliminate customer confusion with one point of contact.

	<p>numerous direct channels to various employees across departments.</p> <p>This makes it challenging for the Town to manage customer interactions and track information. Multiple employees are having to be involved in a customer inquiry that could be completed by one person.</p>	<p>This is meant to act as the primary entry point for customer interactions across all channels (i.e., in-person, phone, email, socials). The Town must create a single phone, email, socials contact for the service function which will be the only one that is highly promoted to the public.</p> <p>The service desk will leverage the existing infrastructure in the main lobby at Victoria Hall.</p> <p>This recommendation does not replace any existing frontline service desks across other facilities or communication channels. It is meant to supplement what is existing to better manage the volume of customer interactions.</p> <p>(Spotlight Recommendation: further detail into this recommendation can be found below)</p>	<ul style="list-style-type: none"> • Streamline customer inquiries. • Decrease transfers between departments. • Minimize time / effort from transfers, rework, errors, and duplication of effort. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 750+ hrs through the streamlining of processes. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$30,000 - \$50,000 • Implementation Costs: \$1,000 - \$5,000 (Support from third-party vendor to construct desk)
3B	<p>Currently, the Town is unable to effectively cover critical service desks in facilities with the existing resources.</p>	<p>Add Customer Service focused resources (i.e., Customer Service Reps) to support the delivery of centralized service and the meeting of Service Level Agreements.</p>	<ul style="list-style-type: none"> • Further supported coverage of the service desk at the Cobourg Community Centre. • Empower directors / managers to support

	<p>This translated into other “non frontline resources” having to be used to complete the roles / activities. Service standards are not able to be met and hours of operation are not able to be effectively covered leaving customer being unserved.</p> <p>This can also lead to increased messages and emails which have long delays in answering due to the lack of time for current resources to stop performing frontline duties and spend time catching up on customer inquiries.</p>	<p>The two (x2) roles recommended to be added to the employee base includes the following.</p> <ul style="list-style-type: none"> • One (x1) full-time CSR within Victoria Hall (this will mean that the Town has two (x2) full time CSR roles to cover the Centralized Customer Service Desk. • One (x1) part-time CSR within the Cobourg Community Centre (to support with the opening and closing hours of the CCC so that there is coverage that is not reliant on the Maintenance staff). 	<p>their teams with the ability of Cobourg Customer Service to meet desired Service Level Standards.</p> <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • Reduction in time / effort of noncustomer service rep roles having to support, cover and get direct customer inquiries that should have been handled by the front line. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: overall cost / benefit estimated to be net positive. • Implementation Costs: \$50,000 - \$75,000 (per year)
3C	<p>The Town is not effectively utilizing digital channels to meet with customers in a more efficient way.</p> <p>Customers do not currently have the ability to connect with the Town via virtual meetings and therefore must come in-person as their only option for a “meeting”.</p>	<p>Incorporate virtual meeting options into the channels available for external customers to interact with departments / staff members. Can be used as an add-on to supplement the current in-person appointment options.</p> <ul style="list-style-type: none"> • Using existing platforms (i.e., Zoom, Microsoft Teams), employees can hold meetings and interact with customers virtually as opposed to only being able 	<ul style="list-style-type: none"> • Reduce the volume of customers coming into physical locations which will reduce the amount of time / effort spent by other departments in providing them with assistance. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 0 – 100 hrs. achieved through streamlining

	<p>Many customers are already using these tools and therefore adoption will be quick for some customer groups.</p>	<p>to hold meetings within their offices.</p> <ul style="list-style-type: none"> • Note: a revised scheduling approach will need to be created that will be accessible by the centralized service desk so that frontline employees are able to book in meetings on behalf of other employees. 	<p>of services and reduction of in person volume.</p> <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 - \$10,000 • Implementation Costs: \$0 (complete in-house)
<p>3D</p>	<p>Employees spend a significant amount of time away from their core job functions to answer customer queries and complaints. This causes additional effort and focus away from daily job functions.</p>	<p>Aligned to the centralized service desk, it is recommended that the Town close off individual department service desks within Victoria Hall and require an “appointment only” approach to in-person / virtual service interactions. CCC, Venture 13, Marina and Campgrounds will continue to have their own service desk.</p>	<ul style="list-style-type: none"> • Departments can focus on main responsibilities without distraction from incoming customer inquiries across channel. • Minimize time / effort from transfers, rework, errors, and duplication of effort. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 501 - 750 hrs. Eliminate Redundancies (time taken away from core jobs) <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 - \$10,000 • Implementation Costs: \$0 (complete in-house)

3E	<p>Customer inquiries / complaints are directed to specific employees that are listed on the website directory. Customer queries are often sent to the incorrect individual / department and require employees to transfer calls / emails to multiple departments.</p>	<p>Remove contact information from public facing sources that allows customers direct access into individual departments.</p> <p>Customer interactions will still be available through appointment booking with the respective departments.</p>	<ul style="list-style-type: none"> Decreased customer confusion with one point of contact. (i.e., centralized customer service desk) <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 501 - 750 hrs. Achieved through the time / effort saved from customers interrupting employee tasks, wrong customers going to the wrong desk and answering calls that are to the wrong extension. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$10,000 - \$30,000 Implementation Costs: \$0 (complete in-house)
3F	<p>Multiple teams are set up together with several makeshift desks / offices. Staff have noted that there isn't adequate space, specifically within the current customer service front desk where it can get congested if there is any line, there is no privacy in conversation</p>	<p>Relocate teams to the basement of Victoria Hall to fully utilize the free rooms that are available. In addition, there are underutilized spaces in the basement of Victoria Hall.</p> <p>Relocate records to the library to allow for more office space in the basement.</p>	<ul style="list-style-type: none"> Space utilization is optimized, and departments have designated office space. Minimize the amount that employees are pulled into customer service-related activities that should be primarily completed by service rep roles.

	<p>and nonservice rep employees are directly next to the desk and therefore are pulled into service inquiries.</p>	<p>Note: A critical starting point for the Town will be to create a broader facility strategy that outlines what teams require privacy and any accessibility needs for direct customer interactions.</p>	<p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 101 - 250 hrs. Achieved through time / effort reductions in teams being in proximity as well as noncustomer service departments members reducing how much time they have to cover the desk. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$10,000 - \$30,000 Implementation Costs: \$5000 - \$10,000 (support from vendor to make rooms usable for business purpose)
<p>3G</p>	<p>Due to the limited number of staff during opening and closing times of the CCC, employees have difficulties managing the services delivered across the entire facility.</p> <p>Currently, the maintenance staff are required to perform this customer service type role, however, this is not their primary job</p>	<p>Modify operating hours and services delivered in the Cobourg Community Centre.</p> <p>Close certain services depending on the time of day and/or resources available to effectively deliver the service.</p> <p>Add signage in the Cobourg Community Centre on who customers can call to get questions answered when the service desk is closed.</p>	<ul style="list-style-type: none"> Staff can more effectively manage facilities in the CCC by limiting the services / space they are responsible for. Customers will be able to use the facility more effectively by having someone available to interact, ask questions and purchase /register for additional programs / services.

	function and they do not have proper training. These service tasks also take them away from ensuring the facility can operate (i.e., ice pads are functional for use).	Note: this recommendation will be impacted and dependent on how the Town executes the Recommendation 3B for adding a Part-Time resource to the CCC Service Desk.	<p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 0 - 100 hrs. (Dependent on what services are closed and at what time of day) <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$0 - \$10,000 Implementation Costs: \$0 (complete in-house)
3H	In-person customers take time away from the public works administrator. These activities can be done via different channels or relocated to the new “Service Cobourg” at Victoria Hall.	<p>Close in-person customer access to Public Works (Building 7).</p> <p>Still enable virtual meetings to take place between employee and customers.</p>	<ul style="list-style-type: none"> Greater focus on main job functions. Improve accessibility by relocating service offerings to Victoria Hall. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 0 - 100 hrs. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$0 - \$10,000 Implementation Costs: \$0 (complete in-house)

Spotlight Recommendation: Centralized Customer Service Desk

The recommendation to **centralize customer service is meant to be in addition to existing frontline customer service reps and service desks. It is not mean to replace these current operations.** The end goal of this operating model is to better manage the volumes of customer interactions into a single point of contact and to better

track service delivery data, metrics, KPIs so the Town of Cobourg has a better understanding of the resourcing needs for delivering services.

A centralized service model is recommended for Cobourg to streamline customer inquiries, increase efficiency, and improve overall customer experience. A centralized customer service model is a service delivery method based on a single point of entry for all service requests. This is used to streamline processes for enhanced efficiency of service by decreasing transfers, improving customer wait times and delays. This will assist in the flow of complaints into departments from a single source, alleviating internal department pain points associated with customer service so they can deliver more efficient services.

A highlight of the model is a centralized customer service desk and representative who is trained to manage customer interactions and responds to service-related requests. In the case that further information is needed, the service representative collaborates with department subject matter experts to process transactions. This relationship is defined in the Services Agreement for each department.

The Benefits of a Centralized Service Centre

The recommended centralized service model for the Town will result in many benefits to the organization. The major benefits can be categorized as follows:

- **Economies of scale per-transaction:** number of calls, emails, web inquiries.
- **Improved customer communication:** a centralized location offers a single point of contact for customers, who can be transferred to the appropriate department for service, if required.
- **Improved analytics and error reduction:** a centralized location makes it easier to gather data for analysis, and to address errors and other issues quickly.

A centralized service model will enable The Town of Cobourg to develop a front-line Centre of excellence for handling customer service needs, while leveraging back-office service workflows. There are many variations and models to service centralization; however, there are Guiding Principles of service centralization to assist The Town with moving through the transformation.

Guiding Principle	Goals Addressed
Create a dedicated customer service function and transfer customer service workload from departments	<ul style="list-style-type: none"> • Consistent experience. • Provide services cost-effectively. • Get to the right person quickly.

Guiding Principle	Goals Addressed
Enable the function to address phone, in person, email and online portal	<ul style="list-style-type: none"> • Simplify access. • Consistent experience.
Define new customer service positions	<ul style="list-style-type: none"> • Consistent experience.
Redesign customer service processes	<ul style="list-style-type: none"> • Consistent experience.
Define service Key Performance Indicators (KPIs)	<ul style="list-style-type: none"> • Define clear service levels. • Design service around customer needs.
Leverage an integrated technology tool to better manage customer processes	<ul style="list-style-type: none"> • Modernize interaction tools. • Centralize customer information. • Digitize more services.
Leverage a shared knowledge base for all staff	<ul style="list-style-type: none"> • Consistent, efficient answers to customers from all staff.

Cobourg Customer Service Desk

It is recommended that the Town incorporate a centralized customer service desk by the entrance of Victoria Hall. The desk should be strategically positioned to be the first point of contact for customers entering the building. This Customer Service Desk will be managed by a Customer Service Representative. The Centralized Service Desk will be established to manage initial customer contact across multiple channels.

- **Overview:** General walk-in customer support and all digital channels (phone, email, online requests)
- **Location:** Entrance of Victoria Hall
- **Operating Hours:** Monday – Friday (8:30am – 4:30pm).
- **Service Channels:**
 - Service Desk – physical location for in-person service to customers
 - Phone - one external number available to customers
 - E-mail - one external address / inbox available to customers (e.g., service@cobourg.ca)
 - Socials – one external “handle / name” available to customers (e.g., @ServiceCobourg)
- **Resources:** Coverage for the Service Desk is recommended to include Two (2) Full-Time, Cross-Trained Customer Service Representatives available during operating hours.

- A single resource can be dedicated to support the foundations of the newly centralized desk before expanding to full coverage.
- At full coverage, resources will trade off primary roles targeting the following focus-areas:
 - Role 1 – “Real-Time” customer service interactions (i.e., in-person and phone channels).
 - Role 2 – “Asynchronous” customer service interaction (i.e., online feedback form, email, mail, and social media).
- It is expected that there will be a bleeding between these roles to accommodate for peak “real-time” volumes.

The following supporting material and service delivery changes are recommended to accommodate customer service centralization:

- Provide the Customer Service Representative with the ability to provide and resolve high-level requests at first point of contact while triaging more complex requests to specific departments by defining and sharing service level agreements (SLAs) between the Customer Service Representative and individual departments.
- Develop a centralized knowledge database in SharePoint that will allow the Customer Service Representative to respond to high-level customer queries in a timely manner.
- Remove contact information of individual departments and employees from the website directory. Instead, display one phone number and email to direct customers to the main customer service phone line and email address. The remaining channels are still left “open”, they are just not advertised to the public. This will help the Town manage customer interaction volumes towards the centralized function.
- Close off individual department service desks within Victoria Hall and require an “appointment only” approach to in-person service interactions. CCC, Venture 13, Marina and Campgrounds will continue to have their own service desk. Redesign facility to setup teams in the basement of Victoria Hall for better use of free rooms currently available.

In-Person Interactions

Within this model, two additional customer service areas are outlined: (1) Cobourg Service Desk with a Customer Service Rep, (2) Triage Desk to conduct appointments with staff. A description of each is found below.

Cobourg Service Desk (Entry Point)

- The Cobourg service desk acts as the first point of contact for all customers entering the building in the main entrance.
- A Cobourg customer service representative located at this counter / desk will be responsible for the intake of all in-person and digital inquiry channels.
- Incoming inquiries or requests are handled at the time of contact or triaged to the appropriate department or role as identified in the department Service Agreement
- Customers are triaged from this desk to the Triage Desk (in-person triage) or Virtual Consultation (virtual triage)

Triage Desk (Triage Point)

- In-person triage option if the inquiry cannot be handled by the Service Cobourg Service Desk
- All access to departments will be restricted and staff are required to complete requests at the triage counter.
- The triage counter will need to be equipped with AODA-compliant design and appropriate technology to facilitate in-person service requests.
- The triage desk is just a space for customers to meet with departmental employees in-person. This reduces the amount of customer interruptions and wrong departments being contacted by customers. Employees will be able to come down to the triage desk once the Service Cobourg team has notified them that a customer is seeking a meeting.

Digital Interactions

- The Customer Service Representative acts as the first point of contact for all customer contacts (in-person (at Victoria Hall), calls, emails, feedback forms, and social media) through the generalized Service Cobourg interaction channels. They are responsible for this during the existing Victoria Hall hours of operation.
- Incoming inquiries or requests are handled at the time of contact or triaged to the appropriate department through a warm transfer. A warm transfer occurs when the Customer Service Representative answers a call and transfers the call to a different employee while passing along any relevant information about customer / interaction.
- The Customer Service Representative will be required to take down information or metrics about the customer interaction. This will ideally be completed within the new recommended CRM System once deployed.

4.4: Service Technology

Service Technology recommendations seek to empower the Town to become more efficient and modernized in service delivery using technology, digitization, and improved use of existing tools. The following recommendations seek to provide the Town with technology to deliver efficient customer service.

ID	Challenge	Recommendation	Value / Benefit
4A	<p>Minimal customer information is being tracked to understand volume, details, and status of interactions with the Town across departments.</p> <p>Service volumes are either being tracked manually with in-house tools (.XSL) by specific departments or not tracked at all.</p>	<p>Design and deploy CRM System for Customer Service function. (Including governance model for who is responsible for inputting data and for managing the captured information as well as technological functionality for tracking new recommended metrics).</p> <ul style="list-style-type: none"> Note: an IT specific diagnostic (recommendation 4B) will need to be completed to understand integration needs with other systems. <p>(Spotlight Recommendation: further detail into this recommendation can be found below)</p>	<ul style="list-style-type: none"> Increase functionality to perform Customer Relationship Management (CRM) capabilities to track customer interactions and service-related information. Aligned data capture with the recommended customer feedback and operational metrics. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 750+ hrs. Achieved through the time / effort saved from reduction in duplication of work, redundancy in tasks, re-opening customer inquiries at every interaction, etc. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$50,000+ Implementation Costs: \$10,000 - \$25,000 (support from third-party vendor) Note: annual licensing fees may be required

			depending on software purchased.
4B	<p>Tools and systems are not being leveraged as efficiently as possible. For example, CityWorks has functionality that is underutilized.</p> <p>For example, it can be used as a customer interaction tracking tool, can have more detailed reporting options, etc.</p>	<p>Conduct a detailed technology review of current tools / systems requirements, specifications, functionality, and integration capabilities.</p>	<ul style="list-style-type: none"> • Ensure current tools are used effectively and optimized to manage customer information tracking. • Ensure integration and updated software can be leveraged. For example, any new systems being purchased within Planning and Development teams should be integrated and/or the same system to ensure streamlined execution of activities by the two departments when collaborating. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • There are future savings potential with optimized tools. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 • Implementation Costs: \$10,000 - \$25,000 (support from third-party vendor).
4C	<p>The Towns current level of maturity and sophistication regarding the ability to track and report on</p>	<p>Modify the approach to capturing service-related operational data and metrics to ensure there is an understanding of</p>	<ul style="list-style-type: none"> • Improve understanding of the volume levels of services provided and in turn, the resource requirements (i.e.,

	<p>operational information is very low.</p> <p>Some service volume and financial information is being tracked for services, but this is generally a manual process and is not done consistently across the organization. This translates into the Town having difficulties in validating improvement opportunities and providing data-driven defenses to resource needs that can require budget approval.</p>	<p>service-related volumes, interactions, times, and resource requirements.</p> <ul style="list-style-type: none"> • Aligned with the implementation of a CRM system, it is recommended that the Town identify which internal metrics are important to track to better understand what is required from staff to deliver services. <ul style="list-style-type: none"> ○ Initial priority metrics include: ○ Volumes of services delivered. ○ Volumes of interactions from customers. ○ Time / effort required to complete services and/or interactions with customers. ○ Resources required to complete the services (i.e., costs). <p>Note: a procedure for how these metrics will be tracked, who will be responsible for reporting and by which system they will be captured is required to implement effectively.</p>	<p>employees) required to meet service levels / standards.</p> <ul style="list-style-type: none"> • Empower Town leaders with data-driven decision-making capabilities and transparent reporting that can be used to validate / defend budget requests. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 • Implementation Costs: \$0 (complete in-house).
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<p>4D</p>	<p>There is a challenge with obtaining accurate, quality and up to date information within the Town for internal employees.</p> <p>Employees have a lack of knowledge / understanding of organizational information, policies, updates, documents, etc. for day-to-day service delivery as well as organizational information including ongoing internal projects and changes to services.</p>	<p>Make improvements to the utilization of current SharePoint system as a centralized repository tool for information access / sharing that is needed by employees to be able to deliver great customer service consistently.</p> <p>Note: An accompanying document governance and management procedure must be created to ensure there is control over the content housed in the system.</p>	<ul style="list-style-type: none"> • Develop knowledge bank of information for employees that can be accessed and referenced easily. • Decrease the amount of time / effort spent by employees trying to locate information or involving additional employees to answer questions they can't get information to resolve themselves. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 501 – 750 hrs. achieved through the decrease in employee time / effort interacting with customers, finding internal answers to questions to progress their individual tasks and decrease amount of support needed by colleagues. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$10,001 – \$30,000 • Implementation Costs: \$0 (complete in-house)
<p>4E</p>	<p>Customers must complete a lengthy process to submit permits and applications.</p>	<p>Increase self-serve capabilities through online channels / access to key municipal services.</p>	<ul style="list-style-type: none"> • Decrease time / effort of employees dealing with customer interactions. • Empower customers to interact with the Town 24/7.

	<p>Customers must download permits and applications via through the municipal website, complete appropriate forms and return completed forms through email or in person.</p>	<p>Target functions to prioritize for self-serve capabilities include the following:</p> <ul style="list-style-type: none"> • e-permitting. • payments. • program scheduling / booking. 	<ul style="list-style-type: none"> • Simplify customer interactions and make activities accessible to residents who cannot get to facilities in-person. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 501 - 750 hrs. Achieved through the time / effort saved from decrease in customer interaction volumes. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$10,001 – \$30,000 • Implementation Costs: \$25,000 - \$50,000 (support from third-party vendor).
4F	<p>Navigation of the website and content found within it can be difficult for customers and does not always have the right / most up-to-date information.</p> <p>Because of this, there is an increase in the volume of interactions into the Town for customers to get the information they seek.</p>	<p>Update website with sections that have the most pressing information and high-volume interactions to reduce interaction volumes into the Town for simple requests.</p> <p>An accompanying procedure must be developed to ensure there is an understanding of the process for getting the content approved and who is ultimately responsible for posting.</p>	<ul style="list-style-type: none"> • Reduction in high-level customer inquiries to the Town. • Customers can obtain answers by self-serving answers to their questions found on the website. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> • 501 - 750 hrs. Achieved through the time / effort saved from decrease in customer interaction volumes. <p>Financial</p>

			<ul style="list-style-type: none"> • Cost / Efficiency Savings: \$10,001 – \$30,000 • Implementation Costs: \$0 (complete in-house).
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Spotlight Recommendation: (CRM) Customer Relationship Management System

A Customer Relationship Management (CRM) software can be used as a tool to create a personalized experience for the customer, improve communication, and increase efficiencies to enhance the overall customer experience. A CRM is a customer database and management tool to track customer interactions and information. A CRM works by enabling the centralization of information, requests, and reports into one CRM database across all channels (in-person, phone, or digital) to be resolved or triaged to the appropriate department.

A CRM system will enable the Town to improve customer service in the following ways:

- Improves service delivery – assists in automating most processes to limit human errors, manual or paper-based processes, and delays in service delivery.
- Promotes transparency – enables citizens to apply for services and view the progress.
- Promotes the use of technology – citizens and employees can access information digitally supporting hybrid work and self-serve options.
- Increased productivity – eliminate manual tasks and streamlines interactions to reduce redundancy.

There are several types of CRM software that offer different levels of functionality to help organizations and teams to achieve different goals and objectives. It is essential to choose the right solution for your current and future needs to ensure the system can evolve with your business.

The right CRM solution rests on the following key decisions:

Cost	Consider budget for one-time / ongoing platform costs and IT resources to manage and support the platform.
Data Security	Choosing a solution that makes sure that customer data is secure, backed up and confidential.

Customer Profile	The need to have a single view of the customer across multiple services and integrate multiple systems.
Reporting	Requirements for reporting and tracking customer data. The Town's limited reporting capacity hinders their ability to utilize data in decision-making, therefore, using a dynamic report or interactive dashboard will help management to gain visibility over trends, customer satisfaction, and KPIs to support decision-making.
Integration	To effectively leverage all technology platforms, consider which applications are needed to integrate with the CRM solution.
Workflows	To reduce bottlenecks and reliance on manual processes; automated workflows are required to trigger assignment, routing and re-routing of service requests to Town staff.
Focus on Customer Service	A fully integrated online experience for customers to fill out forms, communicate through email or phone, receive answers to common questions using an FAQ, and answer survey questions is required to reduce inefficiencies and enhance the overall customer service experience.
Enhanced internal communication	Internal communication between Town staff can be enhanced through a system that can tag and communicate with other divisions to collaborate on service requests and configure alerts to support time management.
Case management	To better manage the increasing level of service requests, a system is required to organize and track service requests by configurable business rules, view the status of work order completion, and edit work orders in the process.

There are many public sector CRM solutions that will offer customized, scalable solutions for customer relationship management. The following vendor is profiled as an example of a CRM that solution that would be suitable for the Town.

Zoho

Zoho is a customizable CRM solution that recognizes every industry is unique, with different customer expectations, unique business processes, distinct pieces of customer information to work with, and varying security and compliance requirements. By blending powerful features with in-depth customization, Zoho CRM helps businesses across all industries engage their customers meaningfully and optimize their sales

operations, resulting in positive customer experiences and better revenue growth opportunities for every business. Zoho’s key features include the following:

- Data importing
- Mobile accessibility
- Analytics
- Email integrations
- Email marketing
- Multichannel support
- Auto-assigning leads with custom rules
- Centralizing accounts, related contacts, and opportunities
- Follow up on sales activities.

As the Town grows and greater CRM functionality is desired, the municipality can seek more robust options that are used by comparable municipalities. A list of comparable CRM solutions is further detailed in Appendix 5.

4.5: Service Training & Skill Development

Customer service training and coaching provides employees with the right knowledge, skills, and confidence to deliver services at their best. It is a great way to make sure every employee understands what great service looks like and has the tools to meet expectations. The following recommendations seek to enable the Town to create a continuous learning culture.

ID	Challenge	Recommendation	Value / Benefit
5A	<p>Employees cite that there is a lack of understanding into the career progression / advancement opportunities at the Town.</p> <p>This translates into increased turnover from employees who look for promotions at outside organizations.</p>	<p>Perform a succession planning assessment to identify current and future resourcing needs. These assessments should include the following:</p> <ul style="list-style-type: none"> • Detailed resourcing assessment performed every 2-5 years to plan for any gaps or role placements needed for the next 3-5 years. 	<ul style="list-style-type: none"> • Increase employee morale. • Increase transparency into career development and opportunities. • Reduce the time / effort associated with the knowledge loss, recruitment, onboarding, and training of new resources.

		<ul style="list-style-type: none"> Tailored career development and advancement programs for major role levels / types. These should be shared and continuously discussed by team managers with each of their direct report employees. <p>Note: this is something that will build upon and include HR planning and team members.</p>	<p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 501 - 750 hrs. Achieved through the time / effort saved from turnover of employees. <p>Financial</p> <ul style="list-style-type: none"> Cost / Efficiency Savings: \$10,001 – \$30,000 (assuming turnover is reduced by 1 resource per year) Implementation Costs: \$0 (complete in-house).
5B	<p>Employees cite that there are minimal opportunities for service-related training and development.</p> <p>This lack of training translates into increased time / effort to perform activities, rework from errors, inefficient use of current tools and inconsistent processes for how services are delivered to customers causing duplication of effort.</p>	<p>Design and deliver organization wide training program to address identified gaps in skills / competencies to drive more effective and efficient delivery of services.</p> <p>(Spotlight Recommendation: further detail into this recommendation can be found below)</p>	<ul style="list-style-type: none"> Increase employee knowledge and skills. Improve customer experiences from interactions with enhanced quality and efficiency of service delivery. Provide a more consistent service experience aligned to the overall goals and expectations of what great service looks like at the Town. <p>Efficiency Savings (Hrs.)</p> <ul style="list-style-type: none"> 750+ hrs. Increase Job Proficiency. Savings achieved through the reduction in time / effort from errors and

			<p>speed in which job tasks are performed.</p> <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$30,001 - \$50,000 • Implementation Costs: \$5,000 – \$10,000 (support from third-party vendor).
5C	Low perceptions of employee recognition.	Expand on existing employee recognition program to recognize employee achievements specifically related to customer service to the community and promote high service-performance culture.	<ul style="list-style-type: none"> • Increase employee morale. • Align expectations from employees with successes of real examples from what colleagues have done. • Reenforce the desired skills and behaviours showcased from employees who are considered high performing. <p>Financial</p> <ul style="list-style-type: none"> • Cost / Efficiency Savings: \$0 • Implementation Costs: \$0 (complete in-house).

Spotlight Recommendation: Cobourg’s Customer Service Training Plan

This training plan has been developed to enhance the knowledge, skills, and awareness to develop a customer-centric culture at the Town of Cobourg. The training plan includes Learner Profiles, Training Categories, and proposed Training Courses.

Training curriculum can be facilitated in house by Cobourg employees; however, it is suggested that this new training program be designed and delivered in collaboration

with a third party vendor to ensure that the level of quality and therefore skills / behaviours development is anchored into Cobourg employees.

Learner Profiles

Learner Profiles are used to identify the right resource for the right training. CSPN has identified four Learner Profiles for the Town of Cobourg. Each learner is aligned to a role-level or function that will impact the knowledge, content, and training required. Note: these definitions are meant to be used for the purpose of grouping employees for training purposes. It is understood that this structure is not the reality of how the Town of Cobourg operates as the role levels are currently interconnected with employees performing activities across all groupings. A more structured and formal division of responsibilities is the future-state desire of the Town of Cobourg organizational structure.

Learner Profile	Description
Executive	Executive-level decision makers and individuals focused on strategic direction of the organization; Director-level and above.
Primary Support	Roles that provide primary support to employees and are responsible for day-to-day management of operations; Management or Supervisors
Individual Contributor	Non-management roles responsible for completion of day-to-day activities and service delivery; Employees who do not have direct reports.
Customer Service	Individual Contributor staff members who are responsible for a distinct customer service function or work within a dedicated customer service team; Customer Service Representatives.

Training Categories and Proposed Courses

The following training categories have been identified to address organizational needs and gaps. These categories are used to organize the proposed training courses.

Training Category	Organizational Need / Gap Addressed
Customer Service Foundations	Lack of customer-centric culture and understanding of customer service expectations; Increase accountability to customer service expectations.

Workplace Skills	Inconsistent or inefficient use of organization-wide technology practices; Minimal training on technical programs or skills.
People Skills	Evolving need to address complex customer complaints or approach difficult situations; Need to support frontline employees with skills and tactics for difficult situations.
Inclusive Service Delivery	Changing demographics and needs of residents is continuously evolving; Need to address gaps in the ability to approach and deliver inclusive service.

Customer Service Foundations: Customer Service Foundations defines what great service looks like at the Town and provides learners with an overview of how that is achieved. This training provides the foundation and promotion of a customer-centric mindset and approach to service delivery.

Proposed Courses	Learning Objectives	Learner Profile
Setting the Customer Service Standard	<ul style="list-style-type: none"> Remember the Customer Service Policy and Service Standards and understand how it applies to your role. Define what appropriate levels of customer service are at the Town and understand how this applies to your role. 	All
Understanding Who Our Customers Are	<ul style="list-style-type: none"> Define who the Town’s customers are and understand unique customer needs or preferences. 	All
Customer Service Representative Preparation	<ul style="list-style-type: none"> Demonstrate a customer service approach and skills to handle customer inquiries. Learn Customer Relationship Management practices and software. Learn best practices and software for appointment scheduling. 	Customer Service

Workplace Skills: Workplace skills encompasses the technical, process, and operational skills an employee needs to be successful within their role. Workplace skills training provides new or existing employees to develop their skills and align with needs of the business. This training focuses on organization-wide needs, rather than role or department specific training.

Proposed Courses	Learning Objectives	Learner Profile
Accessing and Storing Information – SharePoint Processes	<ul style="list-style-type: none"> • Understand how to navigate the SharePoint platform. • Learn best practice for creating, sharing, and updating documents. • Learn organization practices and procedures for record management and retiring records. 	All, As needed
Connecting and Collaborating – Virtual Consultation Platforms	<ul style="list-style-type: none"> • Understand the best practices for virtual consultation and booking meetings. • Learn the functionalities and features of virtual platforms (MS Teams, Zoom). 	All, As needed
Using Department Tools	<ul style="list-style-type: none"> • Understand department programs, systems, and tools used within an individuals’ department. • Learn the functionalities and features of digital tools used day-to-day to increase consistency. 	All
Following Department Procedures	<ul style="list-style-type: none"> • Understand department procedures and best practices to perform department activities. • Define cross-functional roles and shared processes. • Meet department service standards and expectations for assigned tasks. 	All

People Skills: People skills or soft skills are a combination of abilities related to people and social situations rather than a person's technical abilities. These skills are not industry or role-specific, rather skills that relate to personality and behavior and involve tactics that teach new behaviors and ways of thinking.

Proposed Courses	Learning Objectives	Learner Profile
Effective Communication	<ul style="list-style-type: none"> • Understand and apply communication theory. 	All

	<ul style="list-style-type: none"> • Critically think about communication processes and messages. • Write effectively for a variety of contexts and audiences. • Interact skillfully and ethically. • Develop and deliver professional presentations. • Understand and apply techniques of conflict management and resolution. 	
Conflict Management & Resolution	<ul style="list-style-type: none"> • Understand how to recognize the causes of conflicts. • Explain how differences in communication styles can produce tense situations. • Apply solutions for managing cultural expectations and differences. • Remember tactics for better listening and resolution. 	All
Motivating and Leading Teams	<ul style="list-style-type: none"> • Understand the process of conducting annual appraisals, how to use performance management tools, and use Key Performance Indicators. • Learn approaches to giving effective feedback and motivate employees. 	Executive

Inclusive Service Delivery: Inclusive service delivery is the ability to provide citizens and customers with access to social, economic and infrastructure services, irrespective of their location, income, occupation, sex, tribe, or age. Inclusive service delivery training should focus on the benefits of applying an inclusive mindset as part of client service delivery in a government context. Participants will reflect on behaviors and practices that encourage inclusiveness and how to integrate it when delivering services. **Due to the nature of the subject-matter, this delivery is recommended to be delivered via instructor-led methods.**

Proposed Courses	Learning Objectives	Learner Profile
Defining Inclusive Service	<ul style="list-style-type: none"> • Define the core principles of inclusive customer service. 	All

	<ul style="list-style-type: none"> • Understand how to remove barriers to inclusive service. • Acknowledging individual bias and how behaviors influence the customer experience. • Understand how to be an ally and advocate for inclusion. 	
Using Inclusive Language	<ul style="list-style-type: none"> • Define inclusive language and examples. • Recognize common examples of non-inclusive language in the learning and practice environments and explain why each example are not considered inclusive. • Use inclusive language successfully to avoid sexist language and language with age, race, or gender bias. 	All
Understanding Cultural Competency	<ul style="list-style-type: none"> • Explore personal and cultural values, biases, prejudices, and views. • Identify ways in which culture shapes beliefs, practices, and values. • Identify similarities and differences among cultures. • Recognize our own culture(s), including organizational culture. 	All
Optimizing Diversity within Teams	<ul style="list-style-type: none"> • Define what diversity is and how to use it to maximize team performance, innovation, and creativity. • Handle conflict and establish common ground among peers. • Understand tactics to overcome common biases faced in diverse teams. 	Executive

5.0 Implementation Planning

The following implementation roadmap and workplan provides the phased implementation roadmap of recommendations. High-level timelines and costs are provided to guide the prioritization of recommendations.

Stage 1: Preparation

ID	Phased Recommendation	Short-Term (1 - 3 Years)	Medium-Term (3 - 5 Years)	Long-Term (5+ Years)	Key Roles (who's involved)	Key Activities (what needs to be completed)	Timeframe (when will it be done)
1A	Develop Customer Service Vision and Guiding Principles				<ul style="list-style-type: none"> Owner: Department Leaders Support: Department Managers 	<ul style="list-style-type: none"> Collaborate with department leaders to develop Customer Service Visions and Guiding Principles. Formally document and share-out with employees and external customers through communications channels. 	Short Term
1D	Modify Existing Customer Interaction & Complaint Process (aligned to policy).				<ul style="list-style-type: none"> Owner: Department Leaders Support: Communications Team 	<ul style="list-style-type: none"> Identify gaps and develop the complaints process. Create and share new complaints process across departments that 	Short Term

3G	Modify Services Delivered & Operating Hours at Cobourg Community Centre.								<ul style="list-style-type: none"> • Owner: CCC Managers • Support: CCC Employees 	<ul style="list-style-type: none"> • Modify operating hours and services delivered in the CCC. • Close services during opening and closing hours. • Add additional signage informing customers on who to contact to get questions answered. 	Short Term
4A	Design & Deploy a Foundational CRM System for Customer Service function.								<ul style="list-style-type: none"> • Owner: IT Team • Support: Department Leaders 	<ul style="list-style-type: none"> • Identify CRM System to support Customer Service function. • Establish governance and functionality for tracking new recommended metrics. 	Short – Medium Term
5B	Design and Deliver Service-Related Training to the Organization.								<ul style="list-style-type: none"> • Owner: Human Resources • Support: Department Managers, Employee Teams 	<ul style="list-style-type: none"> • Identify current service skills and competency gaps in customer service delivery. • Collaborate with HR to update training activities. 	Short – Long Term

Stage 2: Initiation

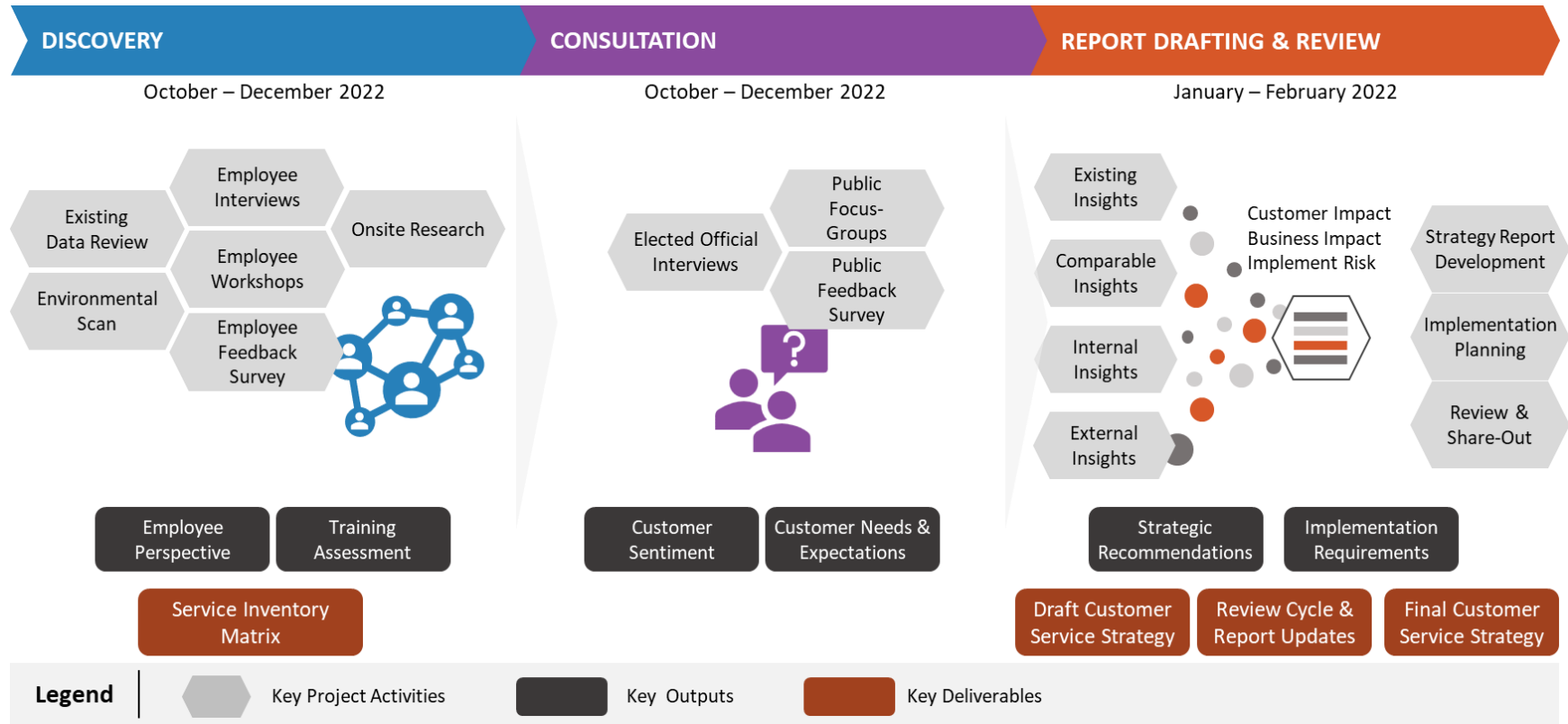
3B	Onboard Two (x2) Additional Customer Service Focused Resources.																	<ul style="list-style-type: none"> • Owner: Human Resources • Support: Department Managers 	<ul style="list-style-type: none"> • Deploy centralized service desk with single resource. • Onboard and cross-train new / existing service reps. at Victoria Hall • Onboard and train new service rep at Cobourg Community Centre. 	Medium-Term
2A	Define a Customer Service Performance Measurement Framework.																	<ul style="list-style-type: none"> • Owner: Department Leaders / Vendor • Support: Department Managers 	<ul style="list-style-type: none"> • Create customer service performance measures that are in alignment with Corporate KPIs with the support of a third-party vendor. • Formally document and share-out with employees. 	Short – Medium Term
1B	Align Service Performance Measurements with Service Standards / Levels.																	<ul style="list-style-type: none"> • Owner: Department Leaders • Support: Department Managers 	<ul style="list-style-type: none"> • Align Customer Service metrics with the newly designed Customer Service Strategy goals. 	Medium Term
4C	Modify Approach to Capturing Service-Related Operational Data & Metrics.																	<ul style="list-style-type: none"> • Owner: Department Leaders 	<ul style="list-style-type: none"> • Define final metrics / KPIs to be tracked and captured. • Define the procedure for tracking (initially assumed 	Short – Medium Term

										<ul style="list-style-type: none"> Support: Department Managers. IT Team 	<p>this will be manual, but will want to look at integrating into IT systems)</p> <ul style="list-style-type: none"> Define the governance structure and expectations for reporting on the captured data. 	
1C	Develop a Customer Insight & Feedback Gathering Procedure / Processes.									<ul style="list-style-type: none"> Owner: Department Leaders Support: Department Managers, IT Team 	<ul style="list-style-type: none"> Develop procedure for obtaining customer feedback. Collaborate with IT Team to deploy activities at a regularly scheduled interval to obtain feedback / insights. 	Medium Term
2C	Develop Service Levels & Standards for Individual Departments.									<ul style="list-style-type: none"> Owner: Department Leaders Support: Department Managers, Employee Teams 	<ul style="list-style-type: none"> Leverage recommendation to identify key SLAs components between customer service and departments. Formally document and share-out with employee teams. 	Medium Term
3F	Relocate Teams that Interact with Customers to Free-									<ul style="list-style-type: none"> Owner: Department Leaders 	<ul style="list-style-type: none"> Relocate records in the basement of Victoria Hall to archive rooms in the library. 	Medium Term

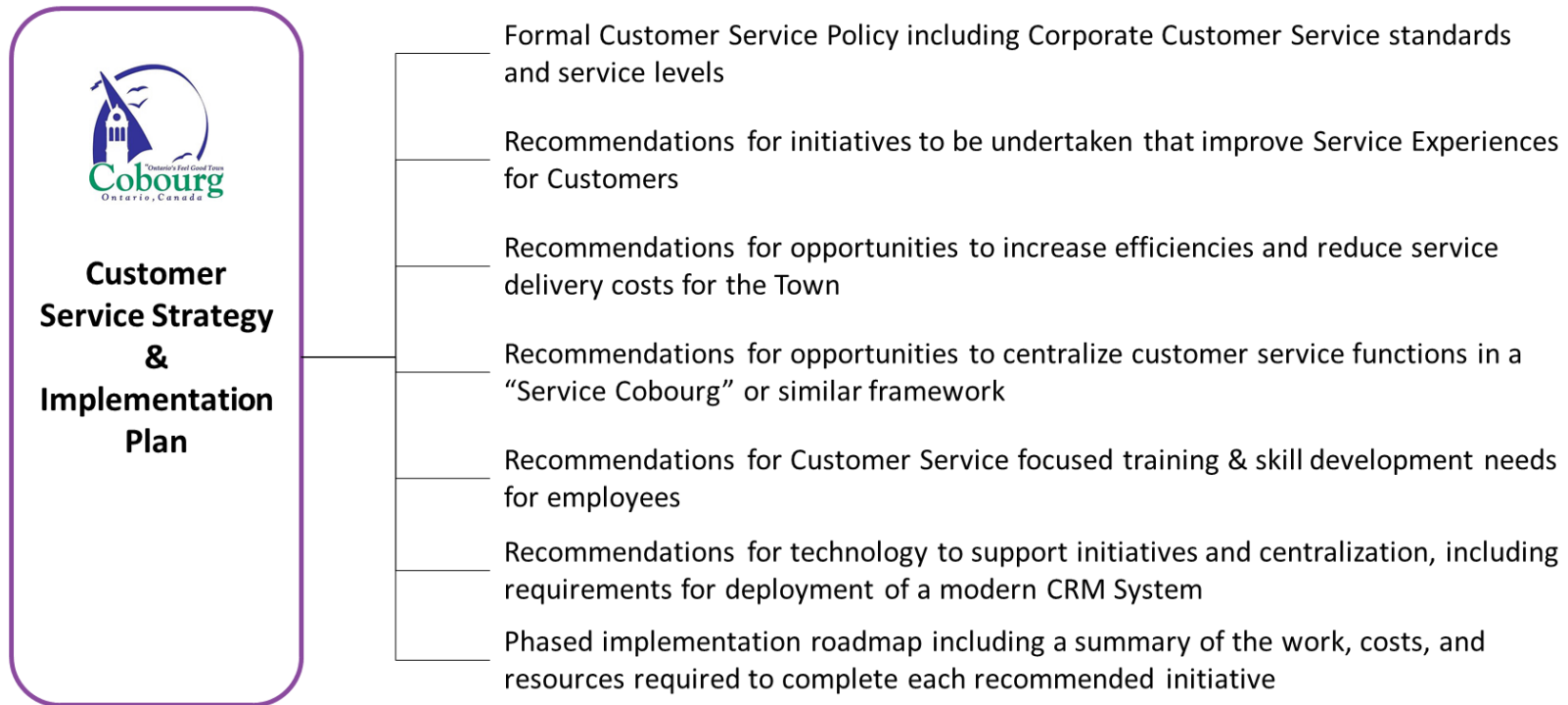
	Online / Digital Channels.									Leaders / Managers	<ul style="list-style-type: none"> Identify services that can be digitized for customers and delivered via online channels. 	
4F	Update Website Structure for Effective Delivery of Key Updates to Customers.									<ul style="list-style-type: none"> Owner: Communications Team Support: Department Managers / Employees 	<ul style="list-style-type: none"> Capture information and high-volume interactions from individual departments. Update website to include relevant information. 	Medium Term
5A	Perform Recurring Succession Planning & Resourcing Assessments.									<ul style="list-style-type: none"> Owner: Human Resources Support: Department Leaders 	<ul style="list-style-type: none"> Perform a succession planning assessment in collaboration with HR department to identify current and future resourcing needs. This can be done every 3-5 years. Develop tailored career development and advancement programs for employees. 	Long Term
1E	Develop Internal Employee Service Levels & Standards									<ul style="list-style-type: none"> Owner: Department Leaders 	<ul style="list-style-type: none"> Align internal employee policies / expectations with external customer policies / expectations. 	Long Term

Appendix

I: Project Workplan Visual



Customer Service Strategy & Implementation Plan Framework



II: Detailed Research Activities

Employee Interviews

CSPN facilitated 36 employee interviews and group workshops with Cobourg Councillors, managers, and customer-facing employees.

Objective: Internal interviews were conducted to understand the current customer service landscape at Cobourg, major challenges / barriers to delivering great service and important gaps that need to be closed.

The table below outlines the employees that were interviewed.

Department: Office of the CAO

Name	Role
T. Vaughan	CAO
E. Beaven	Fire Chief
K. Euale	Manager, Communications
A. Short	Manager, Human Resources

Department: Community Services

Name	Role
Brian Geerts	Director, Community Services
Jackie Chapman Davis	Manager, Culture (Interim)
R. Quigley	Manager, Parks
Teresa Behan	Manager, Recreation & Waterfront
J. Johns	Manager, Facilities

Department: Public Works

Name	Role
Laurie Willis	Director
T. Sokay	Manager, Roads & Sewers

T. Hoekstra	Manager, Engineering & Capital Projects
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Department: Legislative Services

Name	Role
B. Larmer	Director, Legislative Services / Municipal Clerk
K. Feagan	Manager, By-Law Enforcement
J. Diminie	Manager, Strategic Initiatives & Customer Service (ACC / EDI)

Department: Corporate Services

Name	Role
Ian Davey	Director, Corporate Services / Treasurer
Joanne Taylor	Manager, Finance
R. Jeschke	Supervisor, IT

Department: Planning & Development

Name	Role
A. Taylor Scott	Director
Vanessa Reusser	Manager, Planning

Department: Key Customer-Facing Employees

Name	Role
Linda Harris	Community Centre Service Desk (bookings)
Allison Greer	Community Centre Service (Recreational Programs)
Ryan Warner	Venture 13 Admin
Julie Behan-Jones	Marina & Campground
Tayla Kennedy	Clerks Counter
Cassidy Sweet	Finance Counter
Adriane Miller	Building & Planning Counter
Shelly Davey	Public Works Admin

Heather Monsma	Fire Hall Admin
Angela Stewart	By-Law Enforcement Counter
Toni Galea	Mayor & CAO's Office Admin
Krystal Christopher	Deputy Clerk - Committees & Boards

Department: Elected Officials

Name	Role
Lucas Cleveland	Mayor (Newly Elected)
Emily Chorley	Councillor
Miriam Mutton	Councillor (Newly Elected)
Randy Barber	Councillor (Newly Elected)

Employee Survey

CSPN deployed an Employee Service Feedback Survey to Cobourg that was available digitally.

Objective: The Employee Service Feedback Survey was conducted to gain insights on employee experiences while delivering services within their role and business unit and opinions of the current service delivery at The Town. Employee input was used to develop recommendations outlined in the Customer Service Strategy Report.

The table below outlines the deployment details of the Employee Feedback Survey.

Employee Survey Methodology

Sample:	Cobourg Employees
Timeframe:	November 22, 2022 – December 12, 2023
Sample Size:	59 Responses

Customer Survey

CSPN deployed a Customer Service Feedback Survey to Cobourg Customers that was available digitally.

Objective: The Customer Service Feedback Survey was conducted to gain insights on customer experiences, perspectives, and preferences that the community has when interacting with The Town. Customer input was used to develop recommendations outlined in the Customer Service Strategy Report.

The table below outlines the deployment details of the Customer Feedback Survey.

Customer Survey Methodology

Sample:	Cobourg Citizens / Tourists
Timeframe:	December 8, 2022 – January 5, 2023
Sample Size:	110 Responses

Customer Focus Groups

CSPN facilitated 4 customer focus-groups that were conducted virtually.

Objective: Customer focus-groups were conducted to build upon data captured from the mass feedback survey to gain insights on motivational factors behind the levels of customer satisfaction with customer service at The Town.

Approach: Focus-groups were organized around main customer groups and included a set of standardized activities / discussion topics as well as tailored probing questions specific to each group. The main participant engagement and collaboration in sessions were facilitated through shared online whiteboards.

The table below outlines the session details for focus-groups.

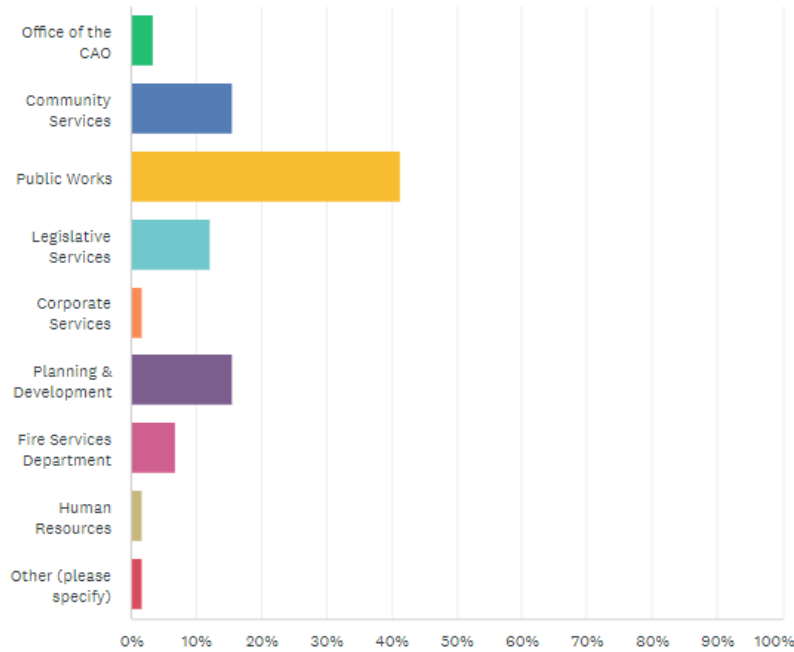
Focus Group	Session Date	Session Length
Business	December 7, 2022	90 minutes
Developer Community	December 13, 2022	90 minutes
Tourists	December 14, 2022	90 minutes
General Residents	December 15, 2022	90 minutes

III: Employee & Customer Survey Responses

Employee Survey Responses

Please select the department / business unit you work within.

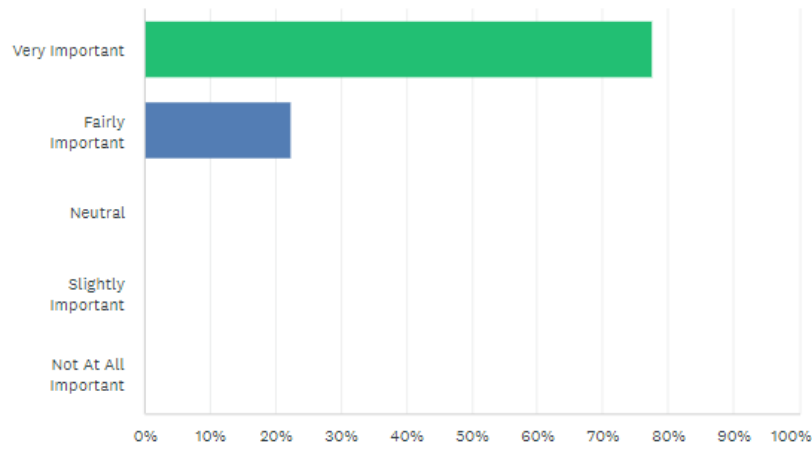
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ANSWER CHOICES	RESPONSES	
Office of the CAO	3.45%	2
Community Services	15.52%	9
Public Works	41.38%	24
Legislative Services	12.07%	7
Corporate Services	1.72%	1
Planning & Development	15.52%	9
Fire Services Department	6.90%	4
Human Resources	1.72%	1
Other (please specify)	Responses 1.72%	1
TOTAL		58

Personally, how important is customer service to you?

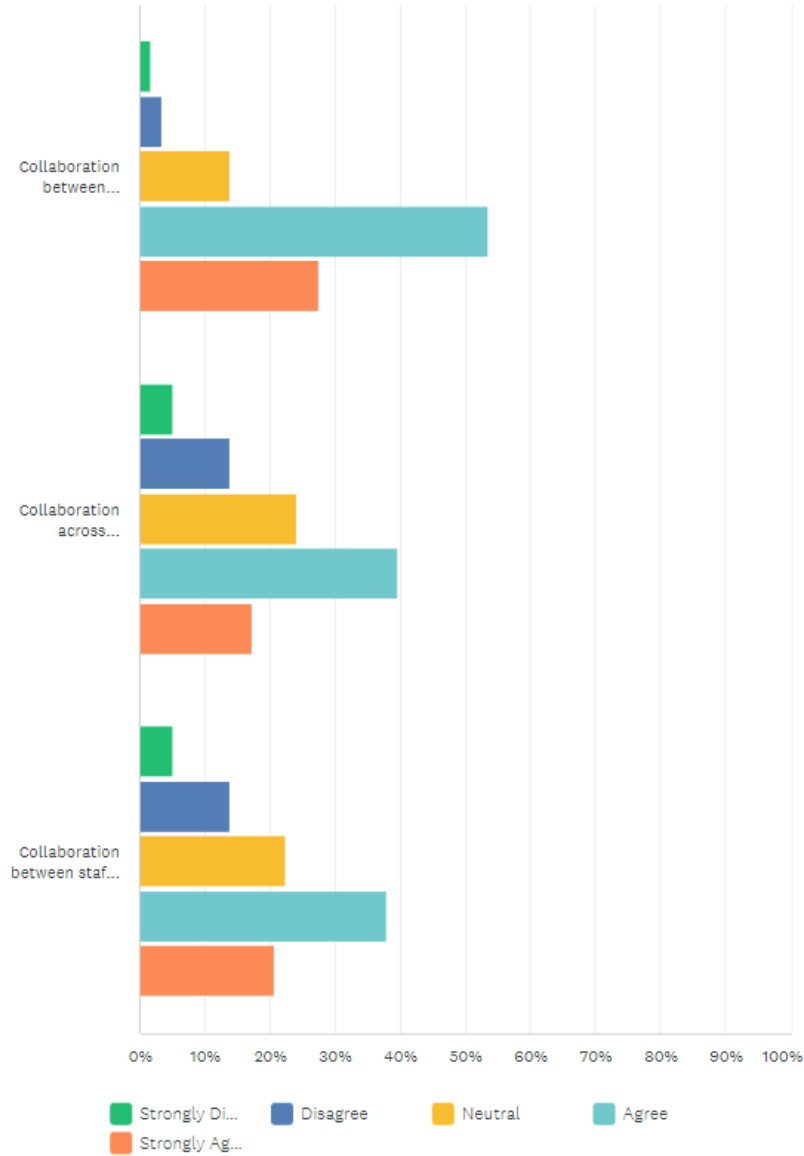
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ANSWER CHOICES	RESPONSES	
▼ Very Important	77.59%	45
▼ Fairly Important	22.41%	13
▼ Neutral	0.00%	0
▼ Slightly Important	0.00%	0
▼ Not At All Important	0.00%	0
TOTAL		58

Collaboration is defined as the action of working jointly with others to provide a service or reach a goal.

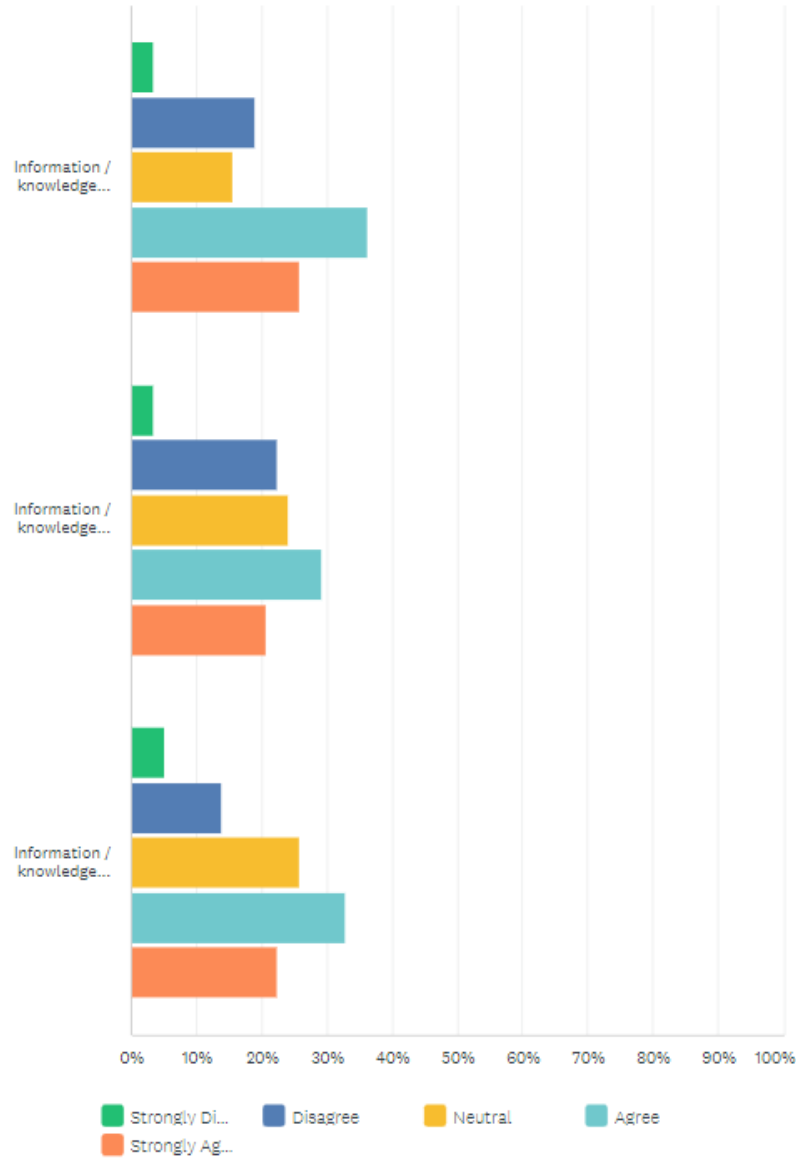
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Collaboration between co-workers is good	1.72% 1	3.45% 2	13.79% 8	53.45% 31	27.59% 16	58	4.02
Collaboration across departments is good	5.17% 3	13.79% 8	24.14% 14	39.66% 23	17.24% 10	58	3.50
Collaboration between staff and Senior Leadership is good	5.17% 3	13.79% 8	22.41% 13	37.93% 22	20.69% 12	58	3.55

Information and knowledge sharing is defined as transfer of knowledge, documents, and other materials needed to complete a service or collaborate to reach a goal.

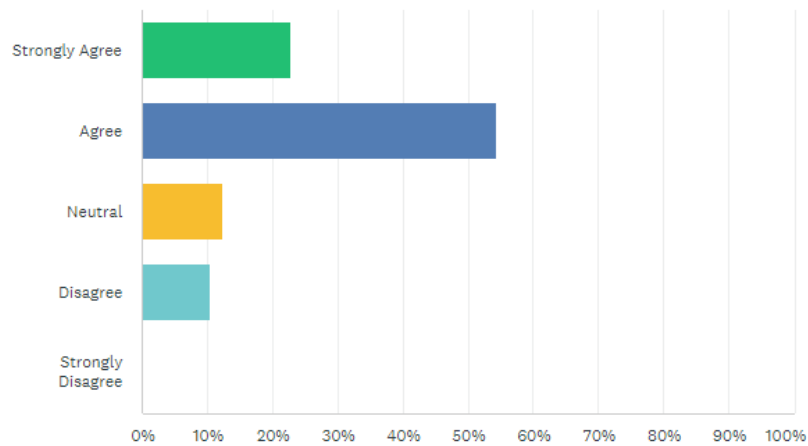
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Information / knowledge sharing between co-workers is good	3.45% 2	18.97% 11	15.52% 9	36.21% 21	25.86% 15	58	3.62
Information / knowledge sharing across departments is good	3.45% 2	22.41% 13	24.14% 14	29.31% 17	20.69% 12	58	3.41
Information / knowledge sharing between staff and Senior Leadership is good	5.17% 3	13.79% 8	25.86% 15	32.76% 19	22.41% 13	58	3.53

I have the right skills and knowledge required to deliver great service.

Answered: 57 Skipped: 2

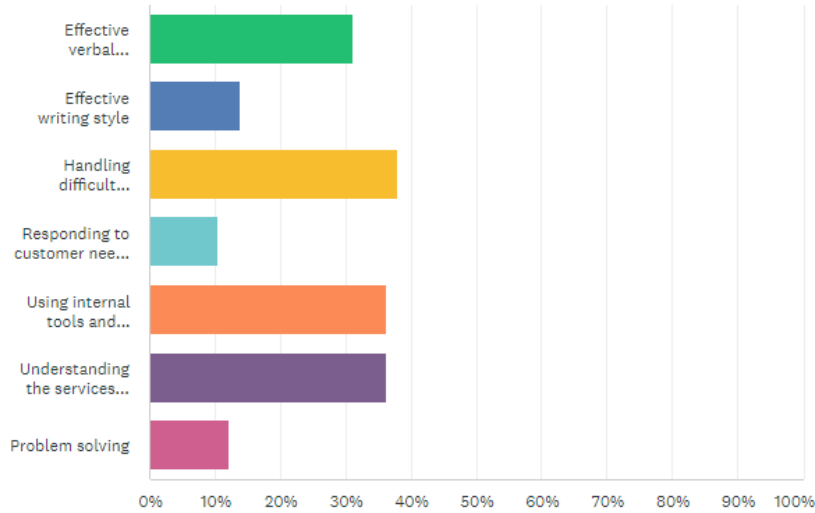


ANSWER CHOICES	RESPONSES
Strongly Agree	22.81% 13
Agree	54.39% 31
Neutral	12.28% 7
Disagree	10.53% 6
Strongly Disagree	0.00% 0
TOTAL	57

Comments (7)

What skills would be most helpful for you to get extra training on to deliver great customer service in your role? (Select top two)

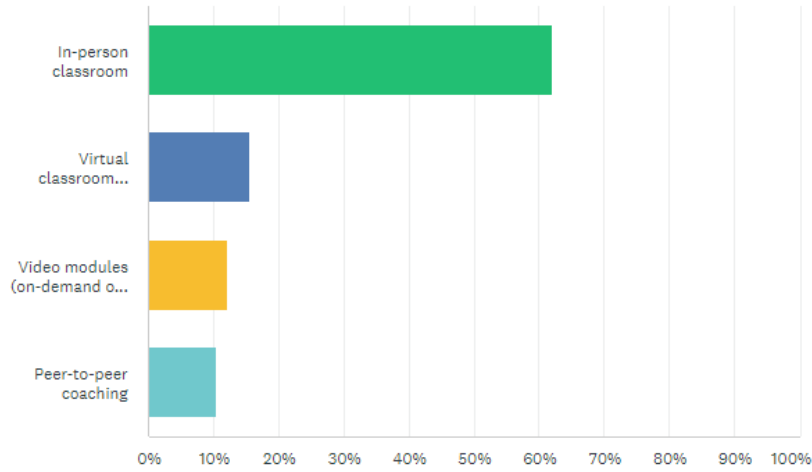
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ANSWER CHOICES	RESPONSES
Effective verbal communication	31.03% 18
Effective writing style	13.79% 8
Handling difficult situations / people	37.93% 22
Responding to customer needs with empathy	10.34% 6
Using internal tools and systems effectively	36.21% 21
Understanding the services available and how they are delivered (across departments)	36.21% 21
Problem solving	12.07% 7
Total Respondents: 58	

When getting trained on new skills, which learning methods do you prefer? (Select top one)

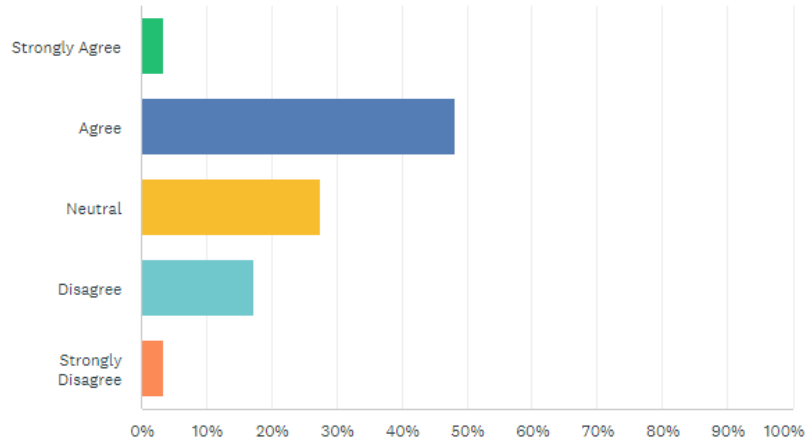
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ANSWER CHOICES	RESPONSES
▼ In-person classroom	62.07% 36
▼ Virtual classroom (real-time with an instructor)	15.52% 9
▼ Video modules (on-demand or pre-recorded)	12.07% 7
▼ Peer-to-peer coaching	10.34% 6
TOTAL	58

I have the appropriate support (i.e. procedures, processes, reference materials, guides, instructions, etc.) required to deliver great service.

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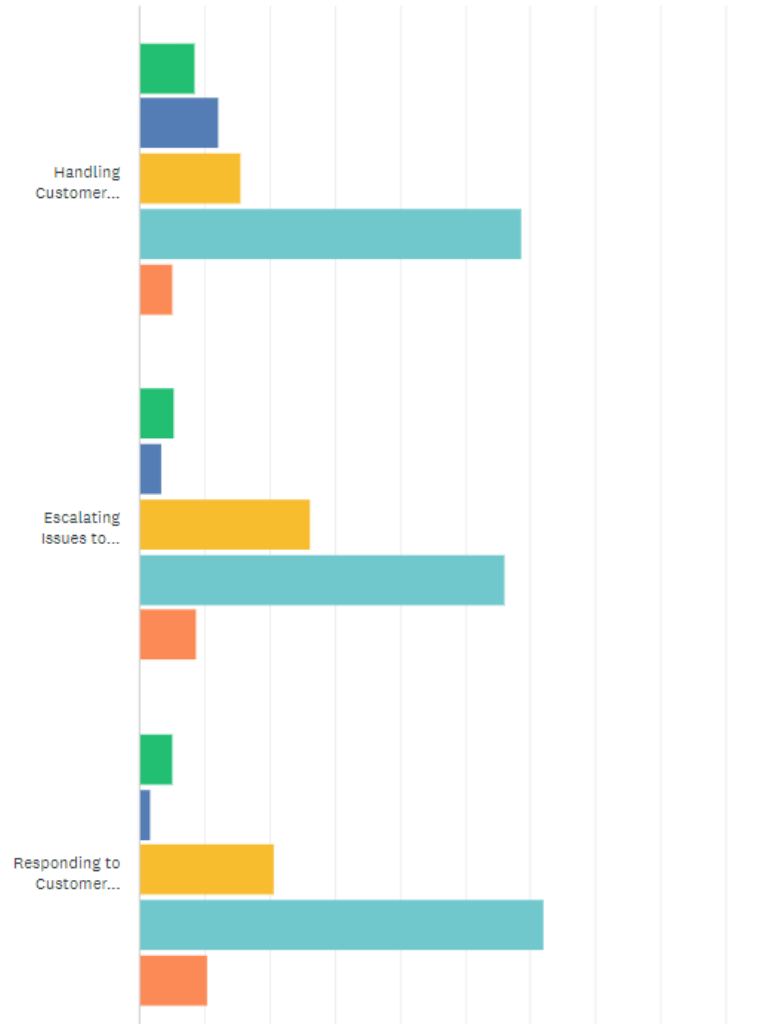


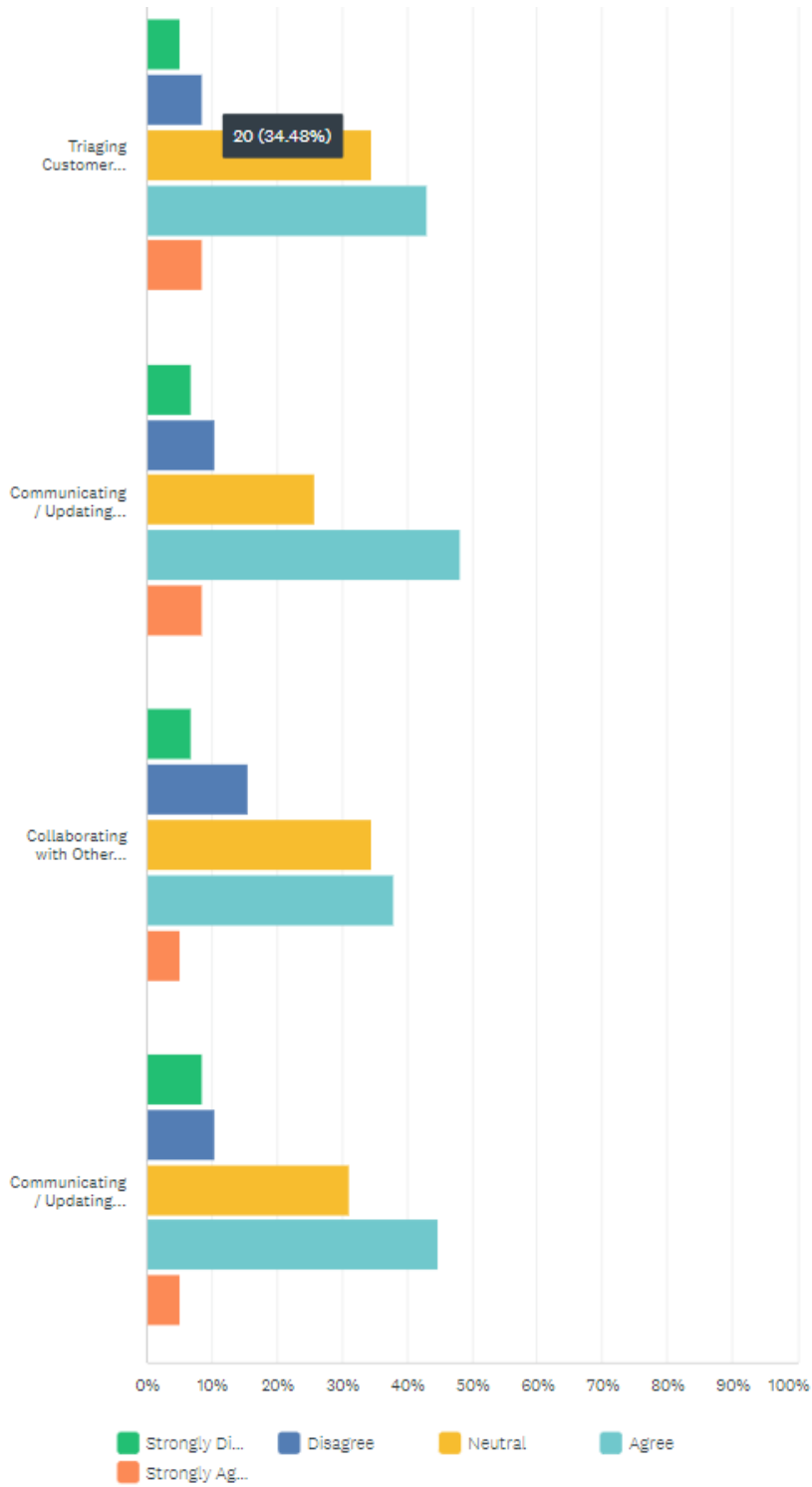
ANSWER CHOICES	RESPONSES
Strongly Agree	3.45% 2
Agree	48.28% 28
Neutral	27.59% 16
Disagree	17.24% 10
Strongly Disagree	3.45% 2
TOTAL	58

Comments (0)

I have the appropriate support (i.e. procedures, processes, reference materials, guides, instructions, etc.) to handle the following customer situations?:

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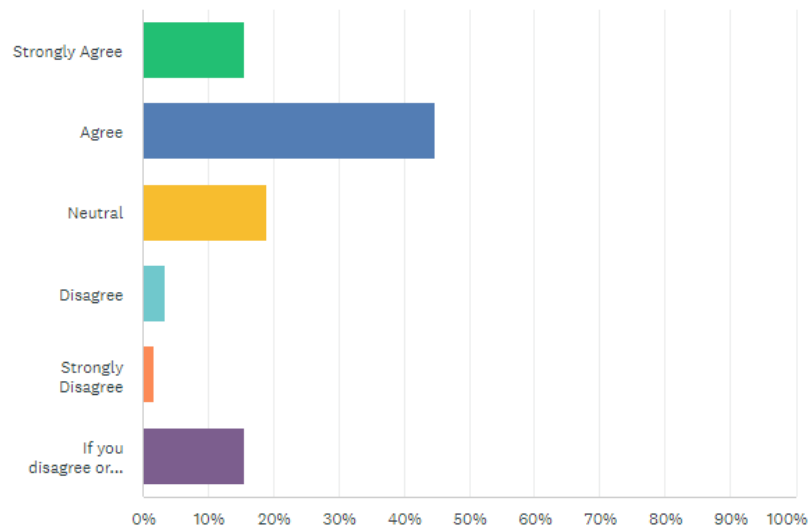




	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
▼ Handling Customer Complaints	8.62% 5	12.07% 7	15.52% 9	58.62% 34	5.17% 3	58	3.40
▼ Escalating Issues to Managers	5.26% 3	3.51% 2	26.32% 15	56.14% 32	8.77% 5	57	3.60
▼ Responding to Customer Inquiries	5.17% 3	1.72% 1	20.69% 12	62.07% 36	10.34% 6	58	3.71
▼ Triaging Customer Inquiries / Complaints to Other Departments	5.17% 3	8.62% 5	34.48% 20	43.10% 25	8.62% 5	58	3.41
▼ Communicating / Updating Customers on the Status of their Requests	6.90% 4	10.34% 6	25.86% 15	48.28% 28	8.62% 5	58	3.41
▼ Collaborating with Other Departments to Complete Customer Requests	6.90% 4	15.52% 9	34.48% 20	37.93% 22	5.17% 3	58	3.19
▼ Communicating / Updating Employees on the Status of Tasks Being Completed for a Customer Request	8.62% 5	10.34% 6	31.03% 18	44.83% 26	5.17% 3	58	3.28

I have the right technology and systems required to deliver great service.

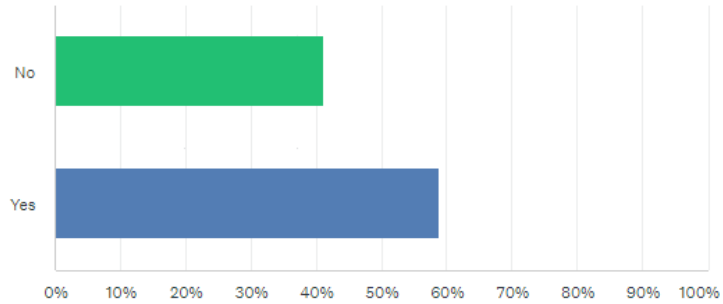
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ANSWER CHOICES	RESPONSES	
Strongly Agree	15.52%	9
Agree	44.83%	26
Neutral	18.97%	11
Disagree	3.45%	2
Strongly Disagree	1.72%	1
If you disagree or strongly disagree, please explain.	Responses 15.52%	9
TOTAL		58

Are there any activities with your job that are very manual and time consuming? (if so, please explain)

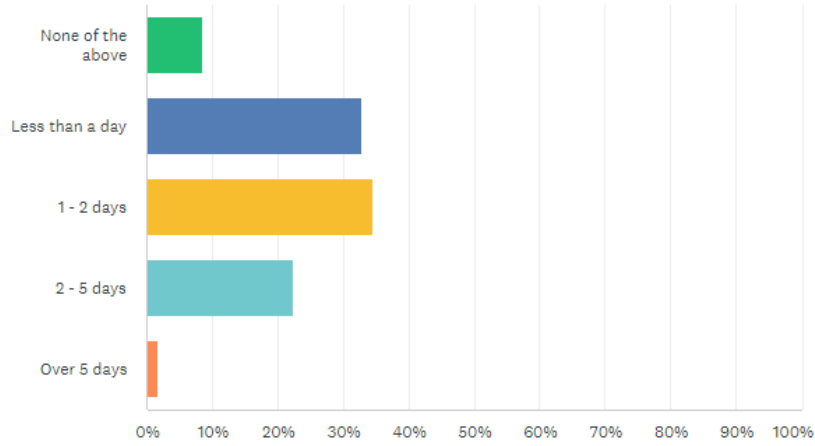
Answered: 56 Skipped: 3



ANSWER CHOICES	RESPONSES	
▼ No	41.07%	23
▼ Yes	Responses 58.93%	33
TOTAL		56

On average, what is the timeframe it takes to initially respond to customer inquiries received via email / online forms?

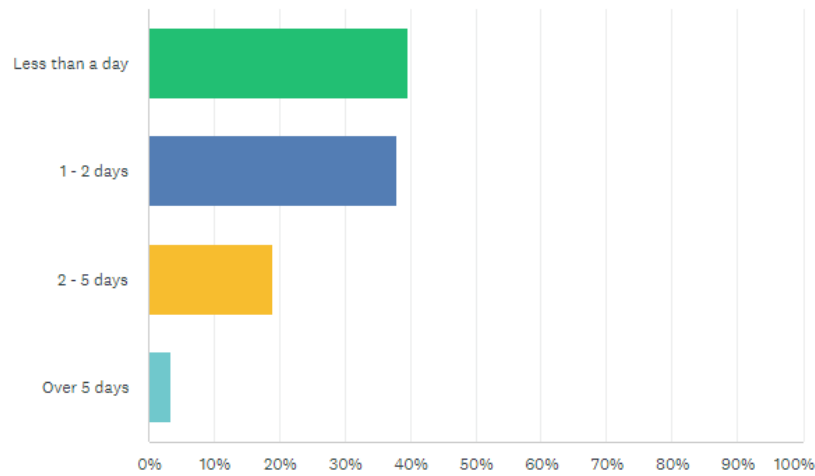
Answered: 58 Skipped: 1



ANSWER CHOICES	RESPONSES
None of the above	8.62% 5
Less than a day	32.76% 19
1 - 2 days	34.48% 20
2 - 5 days	22.41% 13
Over 5 days	1.72% 1
TOTAL	58

On average, what is the timeframe it takes to initially respond to customer inquiries received via phone / voicemail?

Answered: 58 Skipped: 1

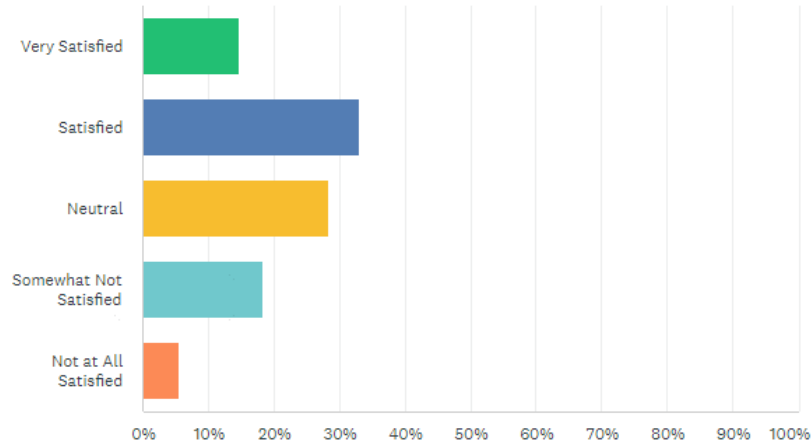


ANSWER CHOICES	RESPONSES
Less than a day	39.66% 23
1 - 2 days	37.93% 22
2 - 5 days	18.97% 11
Over 5 days	3.45% 2
TOTAL	58

Customer Survey Responses

Overall, how satisfied are you with the customer service provided by The Town of Cobourg?

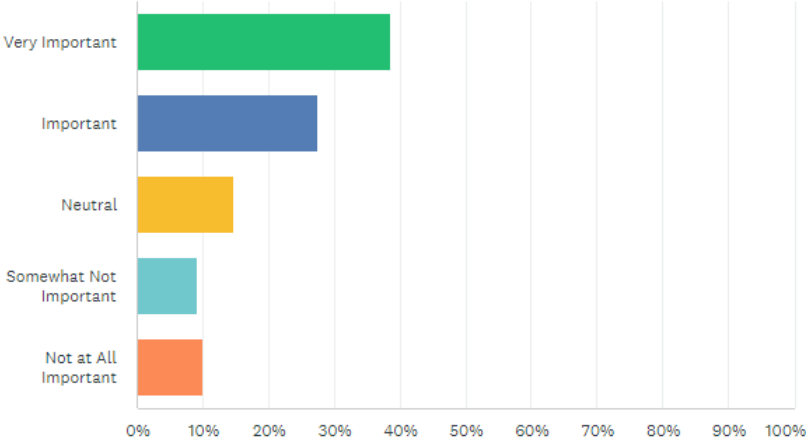
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES	
▼ Very Satisfied	14.68%	16
▼ Satisfied	33.03%	36
▼ Neutral	28.44%	31
▼ Somewhat Not Satisfied	18.35%	20
▼ Not at All Satisfied	5.50%	6
TOTAL		109

When contacting the Town, how important is it to have one point of contact rather than contacting individual departments?

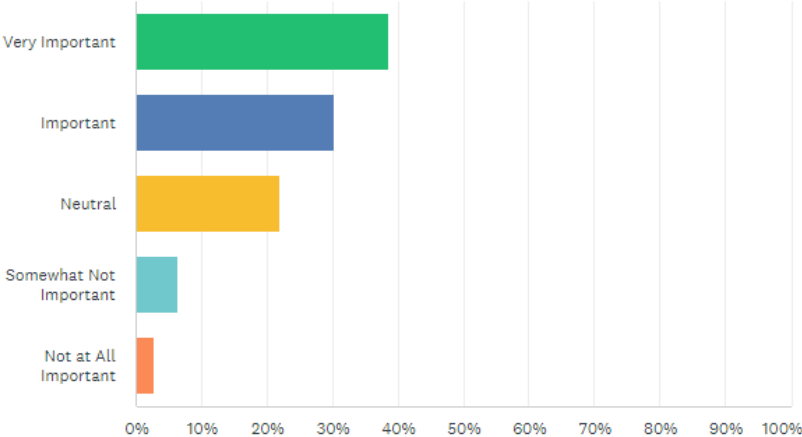
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES
Very Important	38.53% 42
Important	27.52% 30
Neutral	14.68% 16
Somewhat Not Important	9.17% 10
Not at All Important	10.09% 11
TOTAL	109

How important is it to have a Personalized Customer Service experience over a Transactional Customer Service experience?

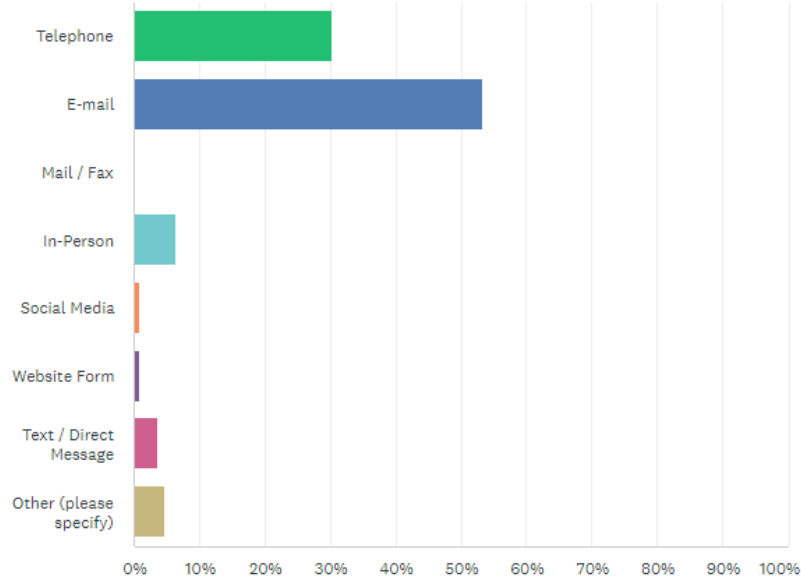
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES
Very Important	38.53% 42
Important	30.28% 33
Neutral	22.02% 24
Somewhat Not Important	6.42% 7
Not at All Important	2.75% 3
TOTAL	109

What is your preferred method of communication when contacting the Town of Cobourg?

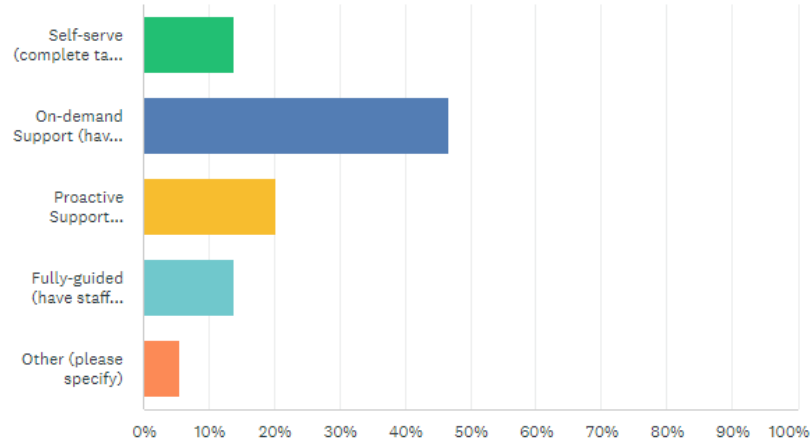
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES	
▼ Telephone	30.28%	33
▼ E-mail	53.21%	58
▼ Mail / Fax	0.00%	0
▼ In-Person	6.42%	7
▼ Social Media	0.92%	1
▼ Website Form	0.92%	1
▼ Text / Direct Message	3.67%	4
▼ Other (please specify)	Responses 4.59%	5
TOTAL		109

What is your preferred method of interaction when dealing with The Town of Cobourg, regardless of what is currently being offered?

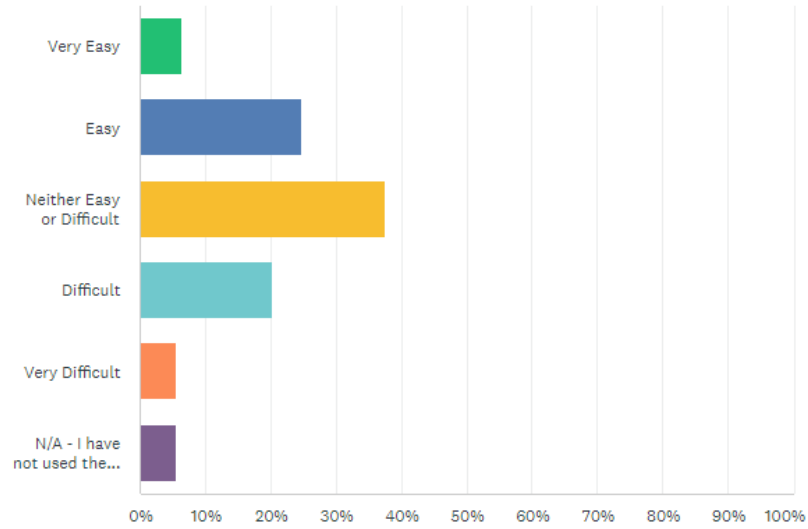
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES	
Self-serve (complete tasks independently)	13.76%	15
On-demand Support (have access to resources / help when required)	46.79%	51
Proactive Support (receive help, updates, "check-ins" periodically and proactively)	20.18%	22
Fully-guided (have staff member to guide the process / service experience)	13.76%	15
Other (please specify)	Responses 5.50%	6
TOTAL		109

Please rank the ease of use / navigation of the Town’s website – cobourg.ca (I.e., is it intuitive?)

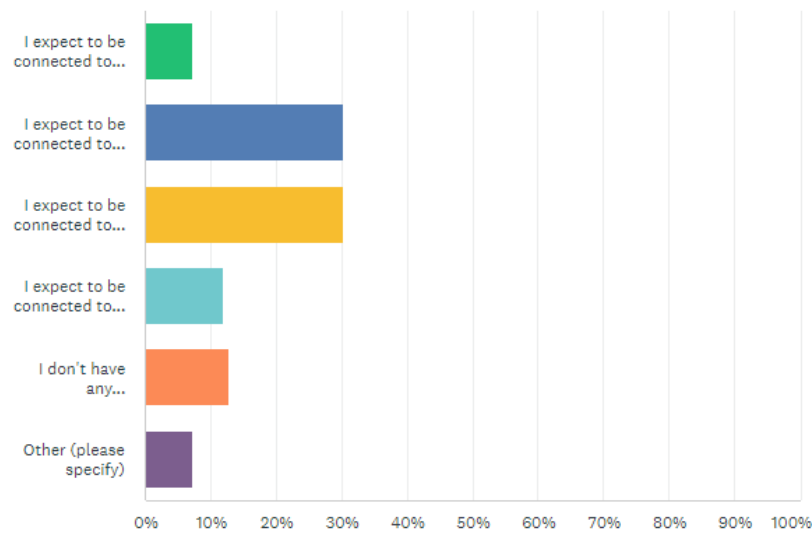
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES
▼ Very Easy	6.42% 7
▼ Easy	24.77% 27
▼ Neither Easy or Difficult	37.61% 41
▼ Difficult	20.18% 22
▼ Very Difficult	5.50% 6
▼ N/A - I have not used the website	5.50% 6
TOTAL	109

When calling the Town, how long do you expect to wait?

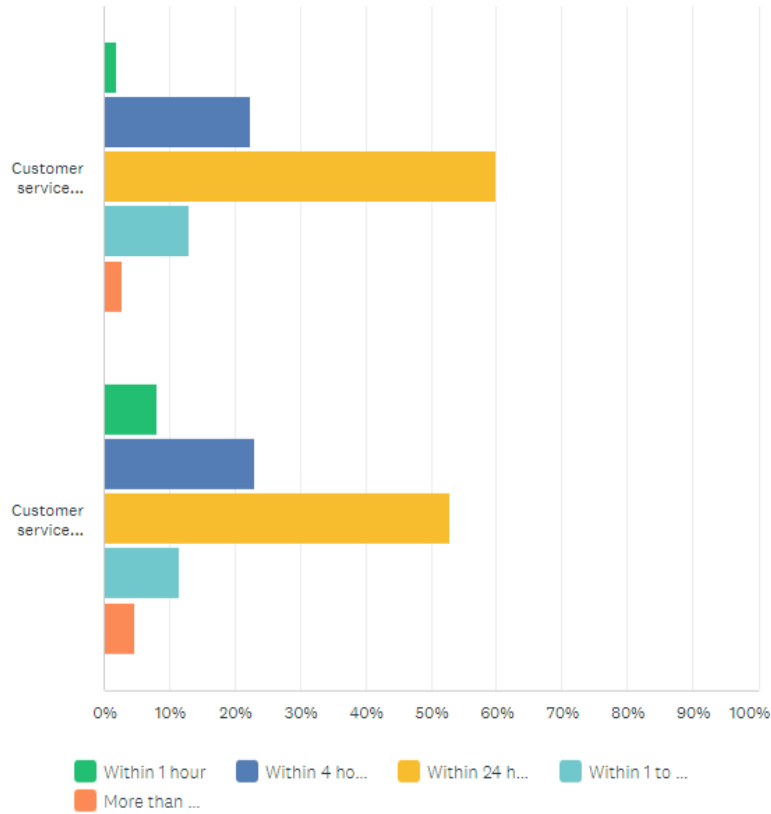
Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES	
▼ I expect to be connected to a representative immediately	7.34%	8
▼ I expect to be connected to a representative in less than one minute	30.28%	33
▼ I expect to be connected to a representative within one to two minutes	30.28%	33
▼ I expect to be connected to a representative within two to three minutes	11.93%	13
▼ I don't have any expectations	12.84%	14
▼ Other (please specify)	Responses 7.34%	8
TOTAL		109

What are your expected response times for each of the following channels?

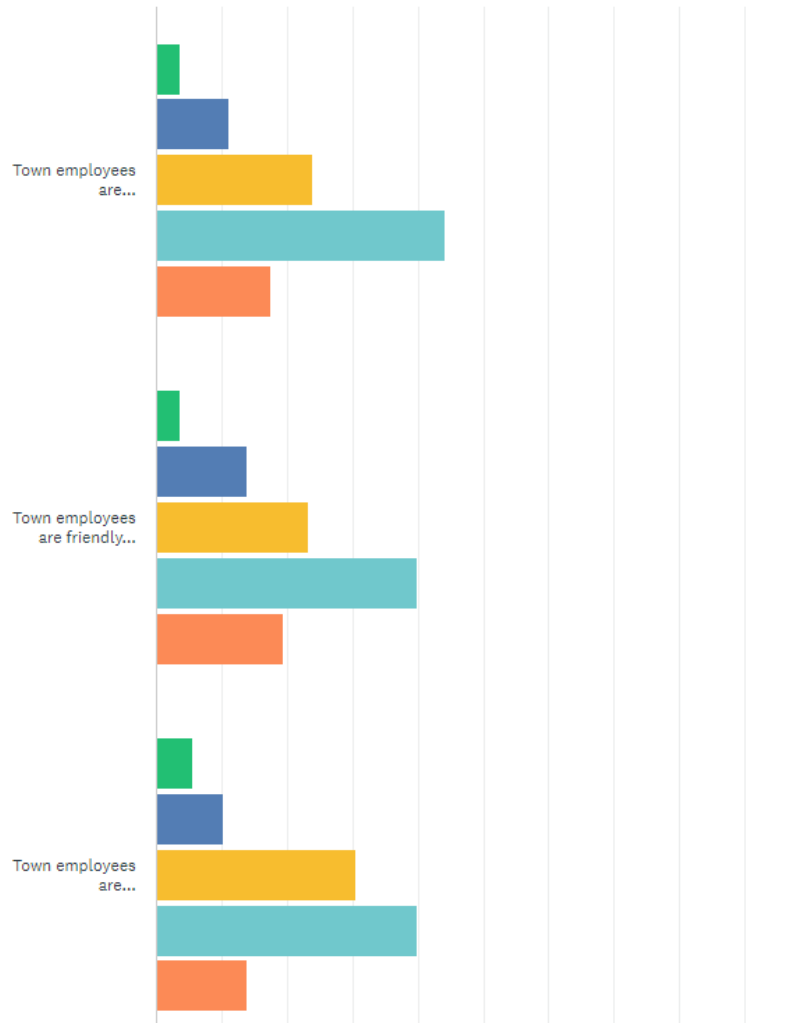
Answered: 108 Skipped: 2

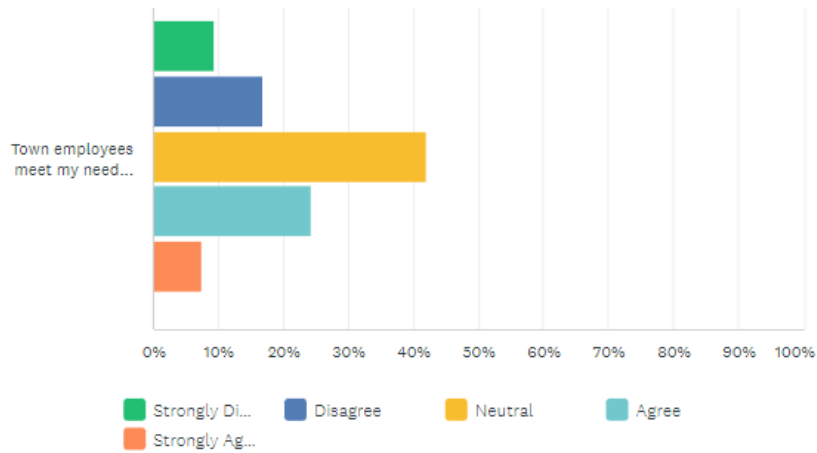


	WITHIN 1 HOUR	WITHIN 4 HOURS	WITHIN 24 HOURS	WITHIN 1 TO 5 DAYS	MORE THAN 5 DAYS	TOTAL	WEIGHTED AVERAGE
Customer service received through email	1.87% 2	22.43% 24	59.81% 64	13.08% 14	2.80% 3	107	2.93
Customer service received through social media	8.05% 7	22.99% 20	52.87% 46	11.49% 10	4.60% 4	87	2.82

When interacting with Town employees, please rate how effectively employees display the following characteristics:

Answered: 109 Skipped: 1

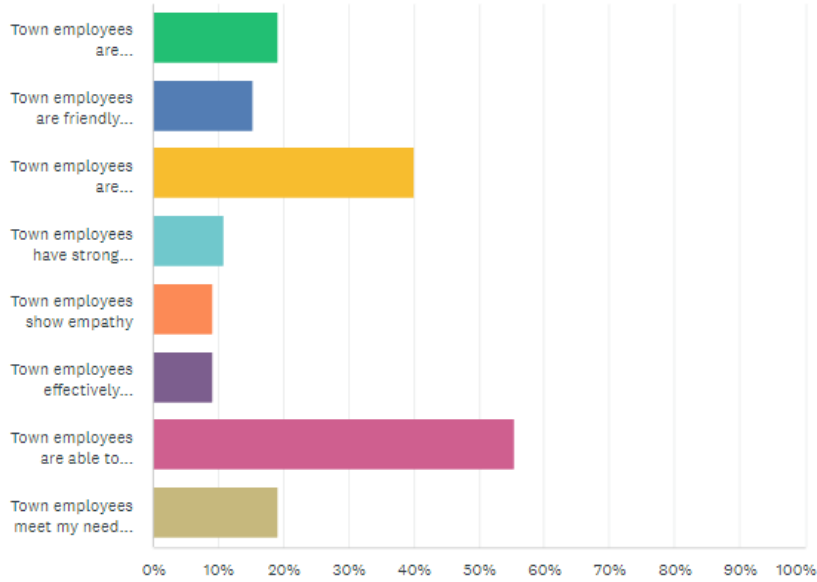




	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
▼ Town employees are professional	3.67% 4	11.01% 12	23.85% 26	44.04% 48	17.43% 19	109	3.61
▼ Town employees are friendly / positive	3.70% 4	13.89% 15	23.15% 25	39.81% 43	19.44% 21	108	3.57
▼ Town employees are knowledgeable	5.56% 6	10.19% 11	30.56% 33	39.81% 43	13.89% 15	108	3.46
▼ Town employees have strong communication skills	4.63% 5	17.59% 19	40.74% 44	26.85% 29	10.19% 11	108	3.20
▼ Town employees show empathy	6.54% 7	23.36% 25	42.99% 46	17.76% 19	9.35% 10	107	3.00
▼ Town employees effectively listen	6.48% 7	19.44% 21	36.11% 39	26.85% 29	11.11% 12	108	3.17
▼ Town employees are able to resolve my issues effectively	11.11% 12	17.59% 19	37.96% 41	26.85% 29	6.48% 7	108	3.00
▼ Town employees meet my needs in a timely manner	9.35% 10	16.82% 18	42.06% 45	24.30% 26	7.48% 8	107	3.04

What is most important to you while interacting with the Town employees?
 (Please select your top two choices from the following list below).

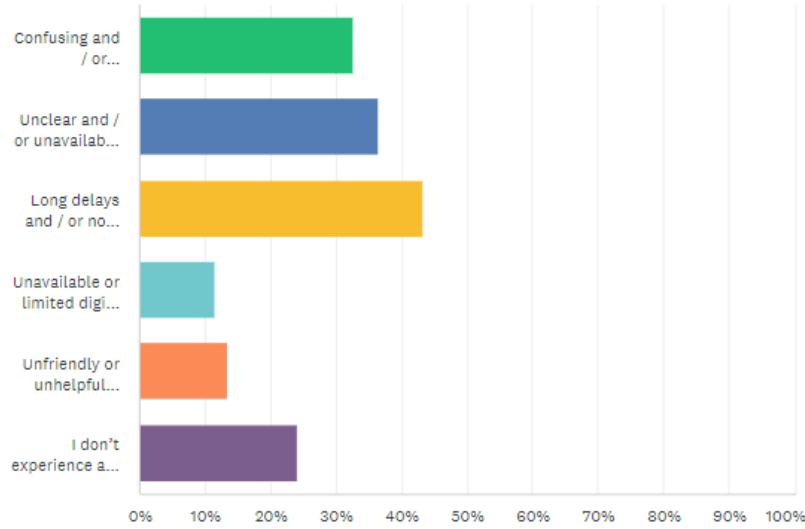
Answered: 110 Skipped: 0



ANSWER CHOICES	RESPONSES
▼ Town employees are professional	19.09% 21
▼ Town employees are friendly / positive	15.45% 17
▼ Town employees are knowledgeable	40.00% 44
▼ Town employees have strong communication skills	10.91% 12
▼ Town employees show empathy	9.09% 10
▼ Town employees effectively listen	9.09% 10
▼ Town employees are able to resolve my issues effectively	55.45% 61
▼ Town employees meet my needs in a timely manner	19.09% 21
Total Respondents: 110	

What are the two (2) greatest challenges / issues you have when interacting with the Town? (Please select your top two choices from the following list below).

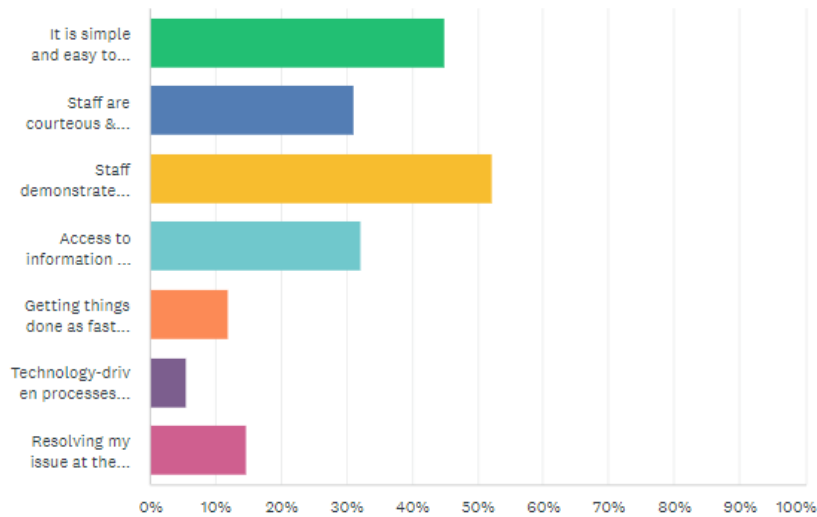
Answered: 104 Skipped: 6



ANSWER CHOICES	RESPONSES
▼ Confusing and / or inconsistent processes	32.69% 34
▼ Unclear and / or unavailable information	36.54% 38
▼ Long delays and / or no responses to inquiries	43.27% 45
▼ Unavailable or limited digital tools / platforms	11.54% 12
▼ Unfriendly or unhelpful attitude from staff members	13.46% 14
▼ I don't experience any challenges / issues	24.04% 25
Total Respondents: 104	

What are the two (2) most important aspects to you when interacting with the Town services? (Please select your top two choices from the following list below).

Answered: 109 Skipped: 1



ANSWER CHOICES	RESPONSES
▼ It is simple and easy to access / use Town services	44.95% 49
▼ Staff are courteous & professional	31.19% 34
▼ Staff demonstrate accountability & follow-up with concerns	52.29% 57
▼ Access to information is accurate and easy to understand	32.11% 35
▼ Getting things done as fast as possible	11.93% 13
▼ Technology-driven processes to do things on my own	5.50% 6
▼ Resolving my issue at the first call / contact	14.68% 16
Total Respondents: 109	

IV: Service Inventory

Cobourg: Customer Service Strategy & Implementation Municipal Service Inventory

Department: Office of the CAO

Business Unit: Human Resources

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Manage all Recruitment, Hiring and Onboarding of New Staff Hires	Internal	Cross-Functional	N/A
Develop and Facilitate Training / Employee Engagement Activities	Internal	Cross-Functional	N/A
Assist with Employee and Labour Relations Activities	Internal	Cross-Functional	N/A
Manage Compensation, Pension and Benefits of Employees	Internal	Individual	N/A
Ensure Occupational Health and Safety of Employees	Internal	Individual	N/A

Business Unit: Fire Services

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Facilitate Safety-Related Educational Programs, Activities and Training to Public	Service Delivery	Individual	Utilizing a tangible service
Perform Fire-Safe Inspections for Permit /	Service Delivery	Cross-Functional	Obtaining approval or permission

License Applications to Commercial and Residential Customers			
Own and Maintain the Town's Emergency Response Plan	Internal	Individual	N/A
Ensure Compliance with Emergency Management & Civil Protection Act	Internal	Individual	N/A
Provide Various Fire, Safety and Medical Emergency Services to Customers	Service Delivery	Individual	Utilizing a tangible service

Business Unit: Communications

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
Own the Development, Review and Deployment of Formal Internal / External Communications Content	Service Support	Cross-Functional	Getting information or advice
Manage Website & Social Media Online Platforms	Service Support	Individual	Getting information or advice
Support Departments with Internal / External Communications, Public Consultation Activities and Training	Service Support	Cross-Functional	N/A
Manage Corporate Brand and Creative Services	Service Support	Cross-Functional	Getting information or advice
Manage Corporate Advertisement Partnership with Business Community	Service Delivery	Cross-Functional	Getting information or advice

Department: Corporate Services

Business Unit: Information Technology Services

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Manage IT Help Desk Service	Internal	Individual	N/A
Provide Internal IT Deployment and Support to Employees / Teams	Internal	Cross-Functional	N/A
Manage Internal IT Infrastructure / Telephony and Data Gathering / Reporting	Internal	Individual	N/A
Support Investigation, Development and Implementation of New Applications and Technology	Internal	Cross-Functional	N/A
Provides the Town with Information on Data Management and Information Security	Internal	Cross-Functional	N/A

Business Unit: Finance

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage Billing, Payments / Collection and Administration of Property	Service Delivery	Individual	Purchasing or making a payment

Taxes and Rebates / Deferrals			
Create Financial Statements and Annual Financial Public Documents	Internal	Cross-Functional	N/A
Manage the Processing and Reconciliation of Invoices / Financial Ledgers	Internal	Individual	N/A
Manage Non-Tax Related Vendor and Accounts Receivable Financials	Service Delivery	Individual	Purchasing or making a payment
Support Departments on Finance-Related Planning, Charges, Grants and Applications	Internal	Cross-Functional	N/A
Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
Manage Insurance and Risk Management Program	Internal	Individual	N/A
Manage Issuance and Procurement Process for Proposal Bids & Tenders	Service Delivery	Cross-Functional	Obtaining approval or permission

Business Unit: Facilities Maintenance

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Lead the Management and Day-to-Day Execution of Service-Operations in all Facilities (Individual Facility Level)	Service Support	Individual	N/A
Own the End-to-End Maintenance and Asset Management in all Municipal	Service Support	Individual	N/A

Facilities (at the Individual Facility Level)			
Ensure Regulatory and Legislative Safety and Electrical Compliance of Facilities	Service Support	Cross-Functional	N/A

Department: Community Services
Business Unit: Cobourg Community Centre

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Complete Recreation Program Registration Process for Customers	Service Delivery	Individual	Obtaining approval or permission
Develop New Programming / Interaction Opportunities for Members	Service Delivery	Individual	Utilizing a tangible service
Manage Memberships & Passes	Service Delivery	Individual	Purchasing or making a payment
Oversee the Management and Day-to-Day Execution of Service-Operations	Service Delivery	Individual	N/A
Manage and Execute of Cobourg Tourism Program	Service Delivery	Individual	Getting information or advice
Promote Programming Through Marketing and Communication (Online, Social Media, Print)	Service Delivery	Individual	Getting information or advice

Business Unit: Recreation and Waterfront

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Complete Marina Reservations for Customers	Service Delivery	Individual	Obtaining approval or permission
Support Boaters and Guests with Harbour Related Resolutions	Service Delivery	Individual	Utilizing a tangible service
Maintain Marina Facilities	Service Delivery	Individual	N/A
Facilitate and Host Festivals and Other Special Events	Service Delivery	Cross-Functional	Utilizing a tangible service
Complete Campground Bookings for Customers	Service Delivery	Individual	Obtaining approval or permission
Manage Payment Process for Various Services	Service Delivery	Individual	Purchasing or making a payment

Business Unit: Parks

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint

Facilitate Consultation Sessions with Community and Volunteer Groups	Service Delivery	Individual	Participating in public consultations
Maintain the Town's 24 Parks, Parkettes and Playgrounds	Service Delivery	Individual	N/A
Conduct Forestry Services, Including Tree Planting, Trimming, Pruning and Removal of Hazards	Service Delivery	Individual	N/A
Maintain Outdoor Sports Fields and Courts	Service Delivery	Individual	N/A

Business Unit: Culture

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage Event Applications from Community	Service Delivery	Individual	Obtaining approval or permission
Collaborate with Community Associations to Host Plays, Concerts and Musical Performances	Service Delivery	Individual	Utilizing a tangible service

Department: Public Works

Business Unit: Engineering and Capital Projects

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
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Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Develop Public Communications Content on Plans, Studies and Upcoming Projects	Service Delivery	Cross-Functional	Getting information or advice
Own the Planning, Design and Construction Process for Major Infrastructure Projects with Vendors	Service Support	Sub-Contracted	N/A
Own the Development of Engineering Research Studies	Internal	Individual	N/A

Business Unit: Roads and Sewers

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Maintain Municipal Property Including Roads, Sidewalks, Traffic Signs and Sewers	Internal	Individual	N/A
Own the Management and Execution of Various Seasonal Maintenance Activities (i.e., Grass Cutting, Snow Removal)	Service Support	Individual	N/A
Control Waste Management Activities	Service Support	Individual	N/A

Business Unit: Transit

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage On-Demand Bus Services and Bookings	Service Delivery	Individual	Purchasing or making a payment
Manage Maintenance Activities for Transportation Related Resources	Service Delivery	Cross-Functional	N/A

Department: Planning and Development
Business Unit: Planning

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	N/A
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	N/A
Provide Consultation Services for Development Applications	Service Delivery	Individual	Utilizing a tangible service
Administering Guidelines and Permit Approvals	Service Delivery	Individual	Obtaining approval or permission
Manage Land Use Including Zoning, Subdivisions and Site Plans	Internal	Individual	N/A
Facilitate Public Consultations to Gather	Service Delivery	Individual	Participating in public consultations

Input and Feedback when Developing Plans			
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Business Unit: Economic Development

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Administer Licenses and Permits for Business, Individuals and Organizations	Service Delivery	Individual	Obtaining approval or permission
Manage the Review and Approval Process for Economic Development Applications	Service Delivery	Individual	Obtaining approval or permission
Provide Consultation Services to Businesses	Service Delivery	Individual	Utilizing a tangible service
Manage Venture 13 operations	Service Delivery	Individual	Utilizing a tangible service
Manage Membership and Bookings for Co-Working, Events and Meeting Spaces in Venture 13	Service Delivery	Individual	Purchasing or making a payment
Provide Entrepreneurial Development Programs for Local Business Community and Youth	Service Delivery	Individual	Utilizing a tangible service

Business Unit: Building

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage the Review and Issuance Process for Specific Permits / Approvals	Service Delivery	Cross-Functional	Obtaining approval or permission
Collaborate with Customers to Facilitate Inspections Related to Permitting	Service Delivery	Individual	Obtaining approval or permission
Lead Enforcement of the Building Code Act	Service Delivery	Individual	Obtaining approval or permission

Department: Legislative Services

Business Unit: Legal

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Cross-Functional	Getting information or advice
Support and Advise Departments on Legal Subject Matter impacting Permits / Services Delivered to Customers	Service Support	Cross-Functional	N/A
Review and Respond to Compliance Requests	Service Support	Individual	N/A
Prepare Development & Non-Development	Internal	N/A	N/A

Agreements / Documents (incl. Licenses and Leases)			
Coordinate Registration of Subdivisions and Land Acquisitions / Dispositions	Internal	N/A	N/A

Business Unit: Clerks

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Cross-Functional	Addressing an issue or complaint
Manage Communications and Activities Processes between Elected Officials and Public	Service Delivery	Individual	Getting information or advice
Manage Payment Process for Various Services / Enforcement Activities	Service Delivery	Individual	Purchasing or making a payment
Provision Advice to Council on Legislative Matters	Internal	Cross-Functional	Addressing an issue or complaint
Prepare Agendas, Reports and Meeting Minutes	Internal	Cross-Functional	Getting information or advice

Business Unit: Accessibility and EDI

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice

Manage Resolution of Customer Issues and Complaints	Service Delivery	Cross-Functional	Addressing an issue or complaint
Review Policies and Procedures to Ensure Accessibility and EDI Practices are Implemented	Service Delivery	Cross-Functional	N/A
Audit Public Spaces and Town Facilities to Ensure Accessibility Needs are Met	Service Delivery	Cross-Functional	N/A
Provide Internal / External Information and Advise on Diversity, Equity & Inclusion Within the Town	Service Support	Individual	Getting information or advice

Business Unit: By-law Enforcement

Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Manage End-to-End Investigation, Administration and Enforcement Process for Bylaw Related Issues	Service Delivery	Cross-Functional	N/A
Ensure Municipal Regulations and Standards and Being Upheld by the Town	Service Delivery	Cross-Functional	Addressing an issue or complaint
Inform and Educate Residents of Municipal By-Laws	Service Delivery	Individual	Getting information or advice
Own the Execution of By-Law and Parking Enforcement Activities	Service Delivery	Cross-Functional	Addressing an issue or complaint
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint

Department: Corporate Services

Business Unit: Information Technology Services

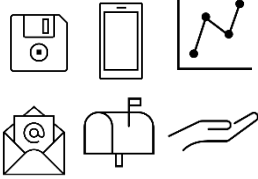
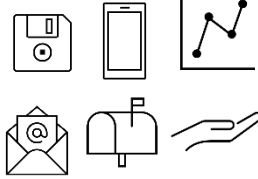
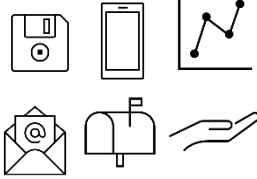



Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Manage IT Help Desk Service	Internal	Individual	N/A
Provide Internal IT Deployment and Support to Employees / Teams	Internal	Cross-Functional	N/A
Manage Internal IT Infrastructure / Telephony and Data Gathering / Reporting	Service Support	Individual	N/A
Support Investigation, Development and Implementation of New Applications and Technology	Service Support	Cross-Functional	N/A
Provides the Town with Information on Data Management and Information Security	Service Support	Cross-Functional	N/A

Business Unit: Finance









Service Activity	Type	Sub-Type	Customer Purpose for Interacting
Provide Information and Support for Customer Inquiries	Service Delivery	Individual	Getting information or advice
Manage Resolution of Customer Issues and Complaints	Service Delivery	Individual	Addressing an issue or complaint
Manage Billing, Payments / Collection and Administration of Property	Service Delivery	Individual	Purchasing or making a payment

Taxes and Rebates / Deferrals			
Create Financial Statements and Annual Financial Public Documents	Internal	Cross-Functional	N/A
Manage the Processing and Reconciliation of Invoices / Financial Ledgers	Internal	Individual	N/A
Manage Non-Tax Related Vendor and Accounts Receivable Financials	Service Delivery	Individual	Purchasing or making a payment
Support Departments on Finance-Related Planning, Charges, Grants and Applications	Internal	Cross-Functional	N/A

V: Comparable CRM Solutions

CRM Solutions	Microsoft	Salesforce	Zoho
Ideal for	Companies in need of a CRM solution with contract management capability.	Businesses looking for a platform that provides forecasting, analytics and real-time updates.	Organizations that need a platform that's equipped with permission-based security.
Business Size	Small & Medium	Small, Medium, & Large	Small, Medium, & Large
Cost	\$\$\$\$	\$\$\$\$	\$\$
Key Features			
Additional Features	<ul style="list-style-type: none"> • Audit changes to business data. • Role-based access. • Measure performance of organizations, business units, teams and individuals. 	<ul style="list-style-type: none"> • Manage and track campaigns across multiple channels. • Securely share files. • Email and calendars. • Real-time updates on contacts and account. 	<ul style="list-style-type: none"> • Auto-assign leads with custom rules. • Centralizes accounts, related contacts, and opportunities. • Follow up on sales activities.
Deployment			

Features & Deployment Legend

	Data Importing		Mobile Accessible
	Analytics		Email Marketing
	Email Integrations		Multichannel Support
	SaaS Platform		On-Premises Platform



20 Bay Street – 11th Floor
Toronto, ON M5J 2N8

Tel: 905-477-5544

Website: www.myCSPN.com