



BLACKLINE
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A Higher Standard

Customer Service Review

Municipality of Middlesex Centre

Council Presentation

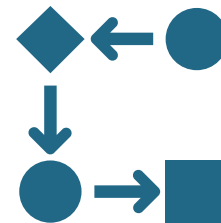
December 2022

Agenda

1. Current Situation
2. Opportunities
3. Roadmap
4. Benefits and Costs

Our scope focused on customer service activities

- ▶ Customer service is:
 - **Process:** repeatable set of steps to address customer needs
 - **Experience:** characteristics of how customers are treated by staff
- ▶ All interactions should offer a consistent experience



Process



Experience

Current Situation



Email and phone are the channels with the largest volume



Customers are broadly satisfied with the service they receive



Current systems limit data-driven decisions to enhance customer service

Customer Service Survey Key Findings

- ▶ Our online, opt-in survey received 185 responses with good geographic coverage
- ▶ We found generally high satisfaction with customer service
- ▶ Phone and email are most common and preferred customer contact methods

Strengths



Knowledgeable and competent staff



Ease of travel

Priorities



Improve quality of information



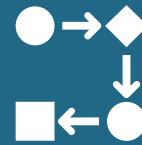
Resolve services in single interaction



Improve ease of contacting right staff

Customer Service Relationship System Considerations

- ▶ CRM systems commonly provide six key functions
- ▶ Efficient use of a CRM requires integration
- ▶ When replacing Keystone, consider systems that provide CRM functions
- ▶ The Municipality may not be ready for a CRM at this time



**Ticketing and
workflow**



**Content
management**



Notifications



**Service level
management**



**System
integration**



**Reporting and
analytics**

Overview of Opportunities

Legend

Dependent on
CRM decision

- ▶ Given the current state, there are ten key customer service opportunities



**Establish Service
Standards and
Begin Tracking**



**Enhance CS
Training Material**



**Customer Service
Awareness
Campaign**



**Launch a Customer
Service Survey**



**Update County GIS
Maps**



**Go-to-Market CRM /
ERP Systems**



**Update
Website**



**Pilot the use of a
Resident Portal**



**Pilot the use of
Robotic Process
Automation**



**Pilot the use of
Chatbots / Live Chat**

Opportunities (1/5)

Opportunity	Description	Benefit
1. Establish Service Standards / Begin Tracking	<ul style="list-style-type: none">▶ Identify what is important to the customer when receiving a service▶ Create service standards▶ Create an expectation or objective for that measure▶ Determine how best to track service standards▶ Establish monitoring and reporting on performance	<ul style="list-style-type: none">▶ Better alignment with customer expectations▶ Evidence-based customer service▶ Improve performance measurement
2. Enhance CS Training Material	<ul style="list-style-type: none">▶ Develop knowledge articles / decision-trees▶ Develop additional CS training material▶ Rollout CS training program	<ul style="list-style-type: none">▶ More efficient customer service▶ Improved levels of customer service

Opportunities (2/5)

Opportunity	Description	Benefit
3. Customer Service Awareness Campaign	<ul style="list-style-type: none">▶ Determine campaign scope and objectives▶ Develop campaign content▶ Launch campaigns and measure performance	<ul style="list-style-type: none">▶ Improve awareness of changes to customer service▶ Improve customer service through resident input▶ Reduced customer service volumes
4. Launch a Customer Service Survey	<ul style="list-style-type: none">▶ Draft a customer satisfaction survey▶ Launch the survey online and promote it▶ Collect survey results, analyze and present findings	<ul style="list-style-type: none">▶ Understand trends and changes to customer service experience

Opportunities (3/5)

Opportunity	Description	Benefit
5. Update County GIS Maps	<ul style="list-style-type: none">▶ Work with the County to regularly update the maps▶ Improve accessibility of zoning data to the public▶ Direct customers to the newly available zoning data	<ul style="list-style-type: none">▶ Building inspectors will need to field fewer zoning questions
6. Go-to-Market CRM / ERP Systems	<ul style="list-style-type: none">▶ Gather requirements▶ Create an RFP and go to market▶ Evaluate and select a vendor▶ Create a business case for implementing a CRM▶ Select the system that best meets the organization's needs	<ul style="list-style-type: none">▶ A joint RFP process will reduce the staff effort and ensure key integrations▶ Improved efficiency▶ Improved customer service levels

Opportunities (4/5)


Opportunity	Description	Benefit
7. Update Website	<ul style="list-style-type: none">▶ Collate list website changes and prioritize▶ Engage web designer▶ Establish trigger points for webform creation▶ Update website and monitor results	<ul style="list-style-type: none">▶ Diverting volume from phone calls / emails▶ Better information for residents
8. Pilot the use of a Resident Portal	<ul style="list-style-type: none">▶ Gather requirements, create an RFP and go to market▶ Evaluate and select a vendor▶ Configure the resident portal▶ Pilot the resident portal▶ Create a business case for Municipality-wide rollout▶ Rollout portal	<ul style="list-style-type: none">▶ Reduced volume of inquiries▶ Reduced data entry needs▶ Improved collection and analysis of metrics

Opportunities (5/5)

Opportunity	Description	Benefit
9. Pilot the use of Robotic Process Automation	<ul style="list-style-type: none">▶ Gather CS use cases▶ Select an RPA platform▶ Perform RPA pilot▶ Create a business case for Municipality-wide rollout▶ Rollout RPA	<ul style="list-style-type: none">▶ Reduce staff time and effort to complete tasks▶ Completes activities in a consistent business rule-driven approach
10. Pilot the use of Chatbots / Live Chat	<ul style="list-style-type: none">▶ Gather requirements, create an RFP and go to market▶ Evaluate and select a vendor▶ Configure the chat system▶ Pilot the chat system▶ Create a business case for Municipality-wide rollout▶ Rollout chat system	<ul style="list-style-type: none">▶ Staff can simultaneously manage several interactions▶ Chatbots can operate 24/7 and scale quickly▶ Chatbots provide additional language coverage

Roadmap

Legend

 Dependent on CRM decision

Opportunity	Relative Timing		
	Year One	Year Two	Year Three
1 Establish Service Standards / Begin Tracking	[Dark Blue Bar]		
2 Enhance CS Training Material	[Dark Blue Bar]		
3 Customer Service Awareness Campaign	[Dark Blue Bar]	[Dark Blue Bar]	[Dark Blue Bar]
4 Launch a Customer Service Survey		[Dark Blue Bar]	[Dark Blue Bar]
5 Update County GIS Maps	[Dark Blue Bar]		
6 Go-to-Market CRM / ERP Systems		[Dark Blue Bar]	[Dark Blue Bar]
7 Update Website	[Dark Blue Bar]		
8 Pilot the use of a Resident Portal		[Dark Blue Bar]	[Dark Blue Bar]
9 Pilot the use of Robotic Process Automation		[Light Green Bar]	
10 Pilot the use of Chatbots / Live Chat			[Light Green Bar]

Benefits and Costs

- ▶ The opportunities identified would reduce customer service staffing effort by between 0.7 and 1.4 FTEs
- ▶ Operating costs would consequently be reduced between \$48k and \$98k
- ▶ CRM implementation costs (one-time) would likely exceed \$250k
- ▶ Annual CRM expenses could range between \$18k to \$50k with 30 users

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