



**Meeting Date:** February 7, 2024

**Prepared By:** Heather Kepran, Manager of Strategic Communications

**Submitted by:** Tiffany Farrell, Director of Corporate Services

**Report No:** CPS-09-2024

**Subject:** Middlesex Centre Customer Service Overview, 2023

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**Recommendation:**

THAT Report CPS-09-2024, re: Middlesex Centre Customer Service Overview, 2023 be received for information.

**Purpose:**

To provide Council with an overview of customer service at Middlesex Centre throughout 2023.

**Background:**

In 2022, Middlesex Centre undertook a Customer Service Review with funding through the Government of Ontario's Provincial Modernization Grant. Blackline Consulting was contracted to complete the work.

Linked to the review, Middlesex Centre developed and implemented a new Customer Services Policy and Procedure in January 2023. The policy directs Corporate Services to bring a report to council each year highlighting customer service at the municipality.

This is the first report under the new policy. It is broken into three sections:

1. Customer Service by the Numbers
2. Customer Service Feedback
3. Responses to the Recommendations in the Customer Service Review

## One: Customer Service by the Numbers

The following provides a sense of the number of customer service interactions each year. It focuses on the general (service area) first points of contact at the office. These numbers should be considered with that in mind – they do not reflect calls or emails that go directly to a specific staff member’s phone or in-box, nor do they reflect the day-to-day interactions of building inspectors, community services staff, and others with members of the public. That is to say, they do not represent all the customer service interactions at the municipality.

### a) Phone Calls to General Lines

In 2023 Middlesex Centre received an average of 1,441 calls per week – or just under 75,000 per year (all phone lines). To get to this number, staff selected two 5-week periods, Jan. 29 to Mar. 4 and Sept. 24 to Oct. 28, and extrapolated the data to the full year.

The municipality has general lines for most service areas. The following table summarizes the number of calls they receive. It is important to note that this does not capture the complexity of the calls, nor does it capture all the customer calls made directly to staff within each department.

<b>Service</b>	<b>Average per Week</b>	<b>Extrapolated to Year</b>
Municipal Office Main Line	243	12,636
Community Services Booking Desk	139	7,228
Building Services Main Line	111	5,772
PWE Main Line	61	3,172
Fire Services Main Line	32	1,664
Water Billing Inquiries	31	1,612
Property Tax Inquiries	26	1,352

### b) Customer Service Front Desk Tracking

Municipal staff began tracking the nature of the requests at the front desk in April 2023 and continued tracking to the end of the year.

Of note in their tracking:

- 65% of calls were related to tax and water inquiries.
- 35% of walk-in customers were there to pay a bill.
- Of the calls received, front desk staff answered or resolved 76%, with the remaining 24% forwarded to other staff members.

c) *Emails to Generic Accounts*

Middlesex Centre uses generic email accounts such as recreation@middlesexcentre.ca and customerservice@middlesexcentre.ca to provide residents and businesses with an easy-to-use address to contact municipal departments directly. In 2023, these email boxes received just under 15,900 messages. The busiest accounts were:

- Accounts Payable – 651 per month  
(note this includes external and internal requests for processing payments)
- Facility Booking – 190 per month
- Customer Service – 174 per month
- Property Taxes – 116 per month

d) *Web / Online Forms*

In addition to the Cloudpermit (building/planning) and Univerus (recreation) systems, residents and business owners can provide feedback and request municipal services through online webforms. The website features several forms for everything from making a by-law complaint to requesting a fire prevention presentation to ordering dog tags. There are also several fillable PDF forms for various services.

Last year, an average of 115 requests per month were made via webform. The most popular forms were:

- Request Email Billing – 26 submissions per month
- Dog Tag Application – 25 submissions per month
- Feedback/Complaint/Service Request – 21 submissions per month
- Request a New Water Account – 14 submissions per month
- Request to Close a Water Account (Final Meter Read) – 12 submissions per month
- By-Law Complaint Form – 7 submissions per month

Incoming requests through webforms are treated as any customer service request, with customers receiving an immediate “pop-up” message acknowledging the receipt of their submission, and then additional follow-up as their request requires.

## Two: Customer Service Feedback

### a) Feedback from Public

One of the recommendations in the Customer Service Review was to conduct regular surveys to gauge residents' satisfaction with the customer service offered by the municipality. To keep costs down, municipal staff have opted to include questions about customer service with the annual budget survey and will conduct a more complete survey once every four years.

The following summarizes the responses received to the customer service questions posed in the 2024 budget survey.

#### Survey Background

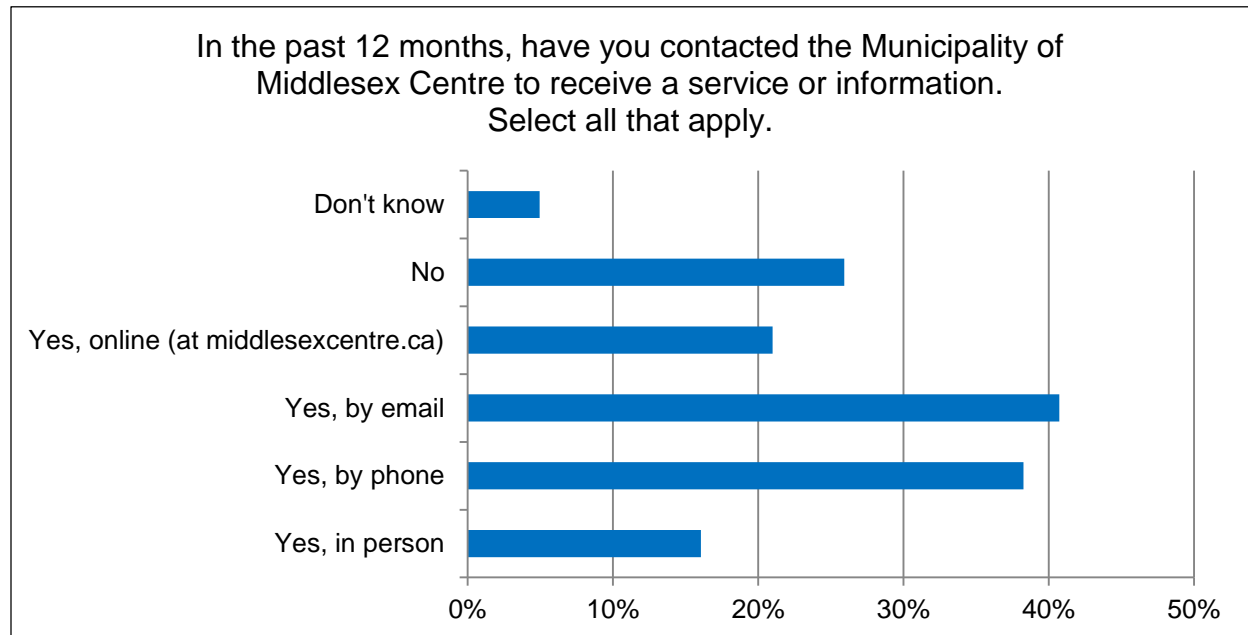
As part of the 2024 Budget Survey, which ran in July and August of 2023, respondents were given an option to answer additional questions about Middlesex Centre customer service. Of the 305 overall respondents, 80 opted to complete the additional questions.

The customer service questions mimicked the questions asked as part of the Customer Service Review survey in May 2022. Data from that survey is provided for comparison purposes. It should be noted that comparisons are based on limited data.

Feedback received from this survey is used by staff to identify customer service training needs, changes to procedures, and future program changes.

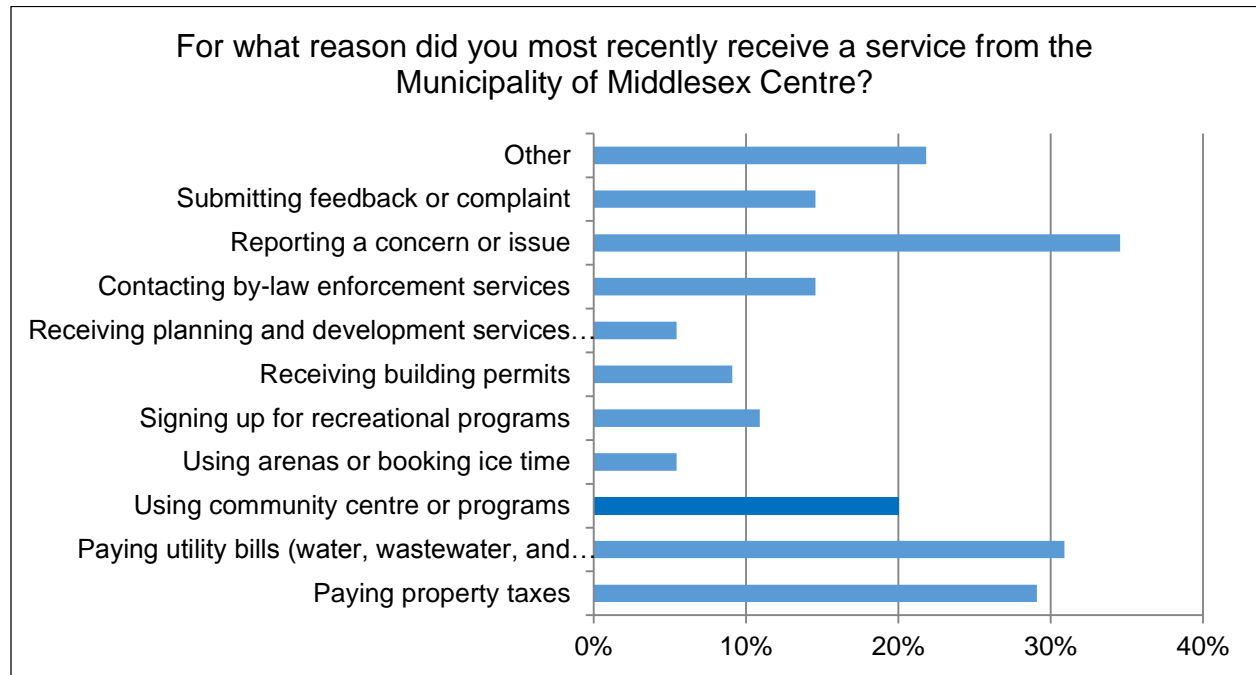
#### Survey Responses Received

##### *Question 1 – How Services have been Accessed*



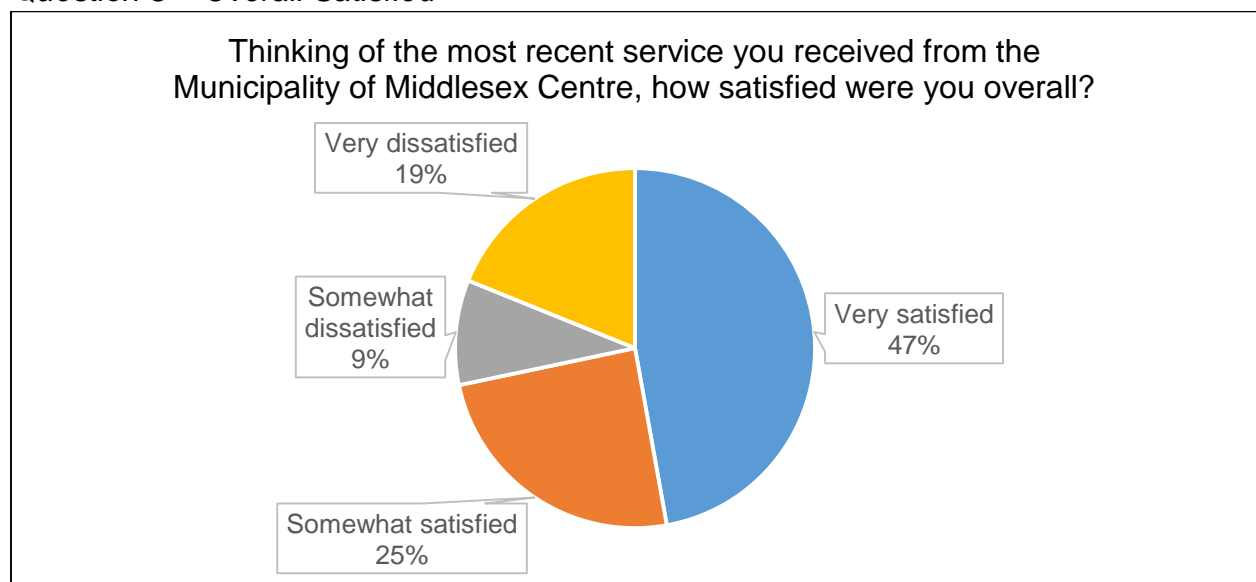
This compares favorably with the 2022 survey, which found, “Phone and email are the most common and preferred contact methods to reach the Municipality.”

*Question 2 – Reason for Most Recent Service Interaction*



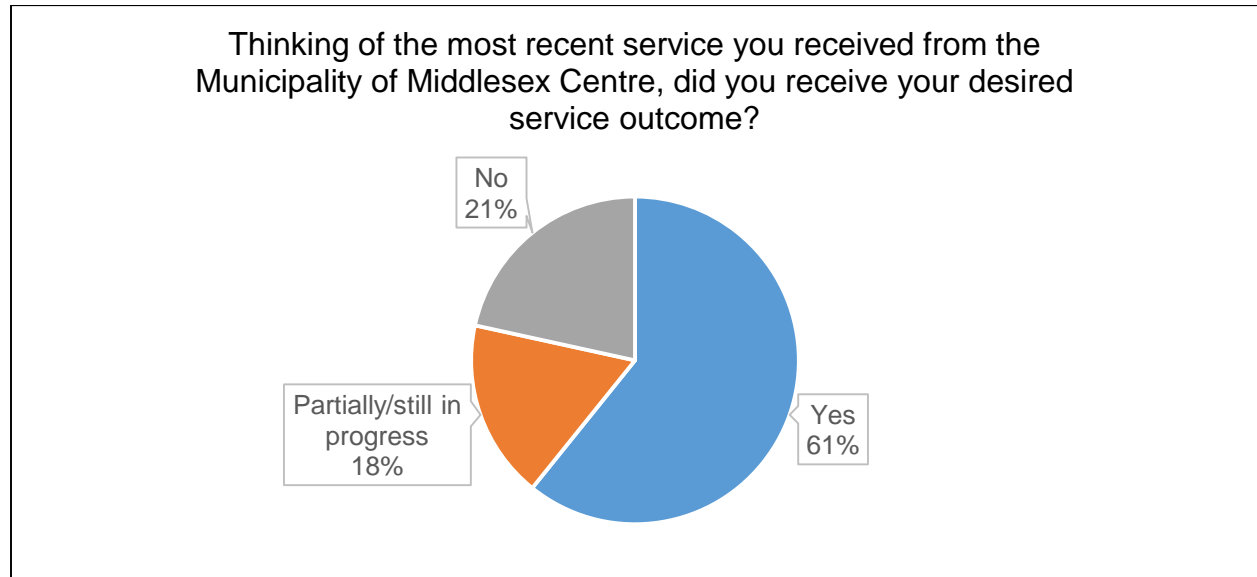
This is similar to the 2022 survey, which found, “The most common reasons for customer service were paying taxes and utility bills.” Reporting a concern or issue has increased as a reason for contacting the office (moving from the third position in the 2022 survey) perhaps because of the focus on “reporting an issue” in municipal communications (newsletter, newspaper, etc.).

*Question 3 – Overall Satisfied*

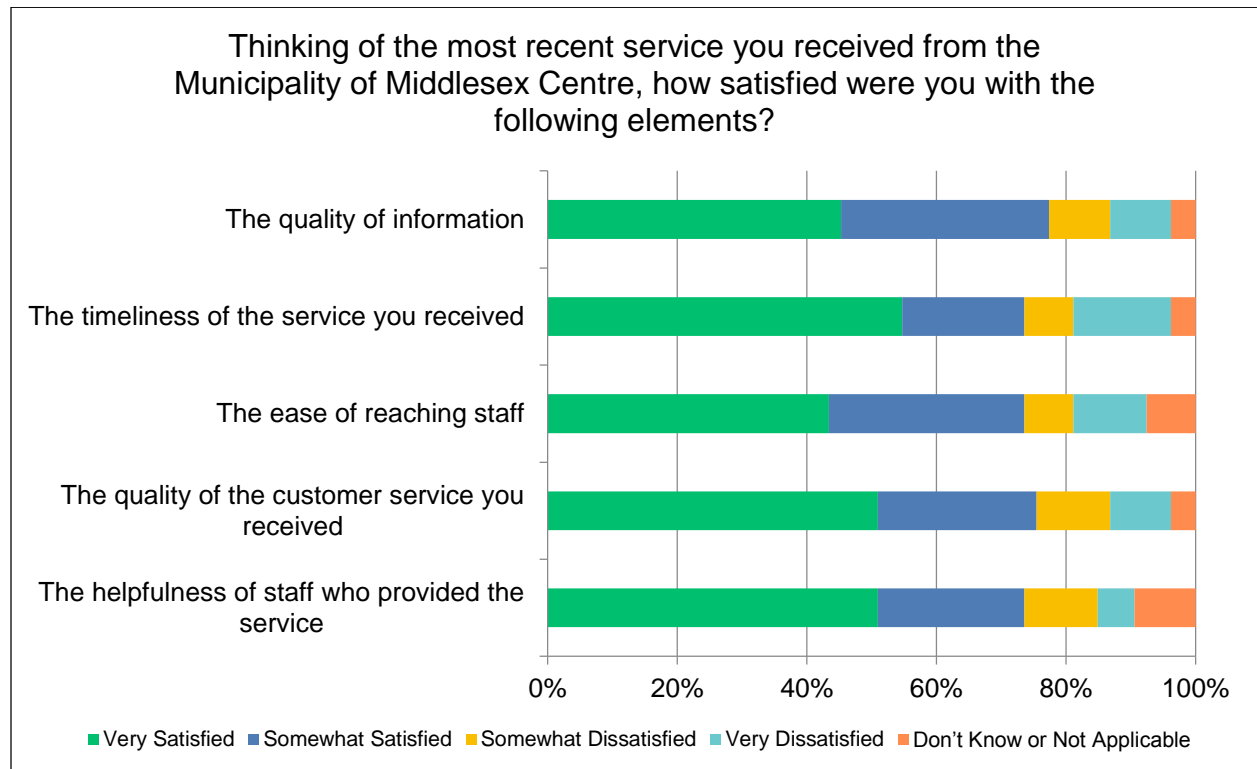


This compares favorably with the 2022 survey response, which found “Most respondents are satisfied overall with the customer service they received, and few are unsatisfied.”

*Question 4 – Desired Service Outcome Received*

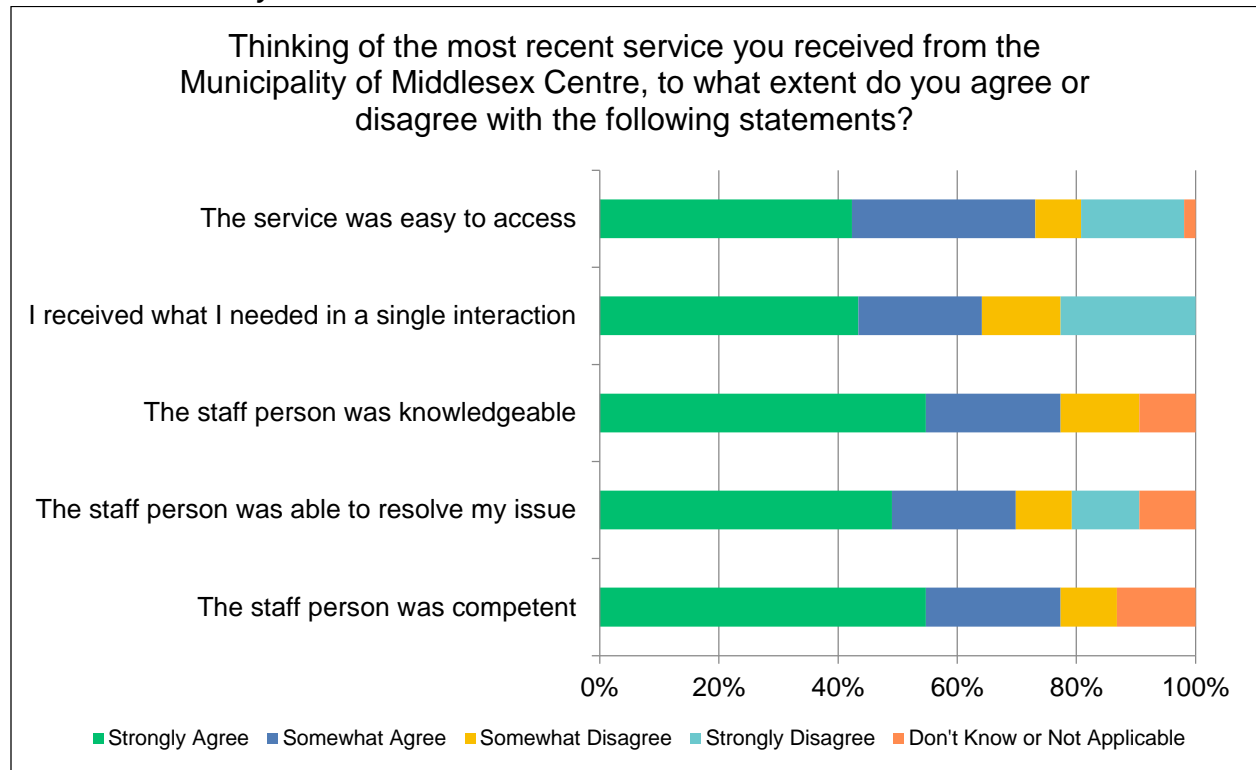


*Question 5 – Satisfaction with Services*



When compared with this question in the 2022 survey, all areas saw a slight increase in those responding very or somewhat satisfied.

*Question 6 – Easy of interaction*



When compared with this question in the 2022 survey, all areas saw a slight increase in respondents indicating they strongly or somewhat agreed.

Written Comments

The survey asked respondents, “Do you have any suggestions for improvements or changes to customer service from the Municipality of Middlesex Centre?” Thirty respondents provided comments.

Of note, seven of those were positive comments, such as “When I have requested a service or information, customer service has been prompt and efficient.”

The remaining comments were about either a specific interaction or suggestion for service improvement. These have been shared with the appropriate departments. It is interesting to note that residents have different improvement suggestions that point to the need for the municipality to continue to offer services in a variety of formats. For example, three residents asked for more people to answer the phone while two asked for more online services.

b) Feedback from Middlesex Centre Staff

Managers were asked if they or their staff had any challenges in meeting the timelines or expectations of the Customer Service Policy. They reported that meeting the timelines in the policy has not been an issue, with staff getting back to requests within guidelines. As a reminder, those guidelines are:

- Straightforward requests can and should be answered within 2 business days.
- Where requests are more complicated and require additional time to respond, staff are to acknowledge receipt of customer request within 2 business days, and then within 5 business days provide a response OR provide a timeline for an expected response. The latter often is necessary when the response requires gathering information from external sources.

Managers indicated two challenges:

- 1) callers not leaving voicemail messages when staff are either on the phone or away from their desk, making it impossible to follow-up with them, and
- 2) managing expectations with regards to responding to a request to acknowledge receipt (customer service) vs. the timelines to undertake the request (operations).

Three: Responding to Recommendations in Customer Service Review

The Customer Service Review put forward several specific recommendations for the municipality to consider. The following table summarizes Middlesex Centre's responses to those recommendations.

<b>Recommendation</b>	<b>Suggested Timing</b>	<b>Year 1 (2023) Status</b>	<b>Middlesex Centre Comment</b>
<b>1a) Establish Service Standards and Begin Tracking</b> Establish a set of service standards and measures that each department will track. Provide guidance on how and what to track.	Y1 Q1 to Q4	Completed and ongoing.	The new policy was implemented early in 2023. Tracking metrics include the number and nature of front-desk phone calls and walk-ins, including how often customers receive an answer to their question without transferring to another staff member. Metrics on phone calls and emails to general accounts is being collected through IT logs.
<b>1b) Establish Service Standards and Begin Tracking</b> Assign accountability to collate and review service standards performance.	Y1 Q1 to Q4	Completed and ongoing.	All staff are responsible for meeting customer service standards (such as response timelines). Managers are responsible for monitoring service times and working to address any deficiencies. Front desk staff are responsible for data collection.



Recommendation	Suggested Timing	Year 1 (2023) Status	Middlesex Centre Comment
<p><b>2) Enhance CS Training Material</b> Revise CS training program to be periodic and revise CS material and procedures binder.</p>	Y1 Q1	Completed and ongoing.	<p>With the roll-out of the new Customer Service Policy, last year all staff completed the following training via HRDownloads:</p> <ul style="list-style-type: none"> <li>• Customer Service Excellence Training</li> <li>• AODA Customer Service Standards Refresher Training</li> <li>• Demonstrating Respect at Work Training</li> <li>• Telephone, E-mail, and Social Media Etiquette Training (Immersive)</li> </ul> <p>Staff with significant customer service elements to their roles, including administrative assistants, completed training through AMCTO's Mastering Customer Service Webinar Series: a) Understanding your Customer Base, and b) Identifying and Dealing with Difficult Customers.</p> <p>Additionally, as part of the Dementia Friendly Community Supporter program, the municipality provided dementia friendly training to more than 75% of staff who interact with the public.</p> <p>The front desk customer service "binder" is updated as needed and reviewed quarterly to ensure it is up-to-date.</p>
<p><b>3) Customer Service Awareness Campaign</b> Develop a communications marketing campaign to deliver targeted messaging to improve residents' awareness of customer services (with a focus on e-billing and other online services).</p>	Y1 Q3, Y2 Q3, Y3 Q3	Completed and ongoing.	<p>Staff continue to promote e-billing, preauthorized payments and other online payment options through the website, social media, tax and water bills, tax bill inserts, and so forth.</p> <p>The use of these services continues to grow. As an example, for Middlesex Centre tax billing:</p> <ul style="list-style-type: none"> <li>• Accounts (properties) with Email Billing: <ul style="list-style-type: none"> <li>○ 2019 – 764</li> <li>○ 2023 (mid-year) – 1,867</li> <li>○ 2023 (year-end) – 2,022</li> </ul> </li> <li>• Accounts (properties) with Preauthorized Payments: <ul style="list-style-type: none"> <li>○ 2019 – 1,316</li> <li>○ 2023 (to May 23, 2023) – 1,731</li> <li>○ 2023 (to Dec 31, 2023) – 1,786</li> </ul> </li> </ul>

Recommendation	Suggested Timing	Year 1 (2023) Status	Middlesex Centre Comment
<p><b>4) Launch a Customer Service Survey</b></p> <p>Introduce an online biannual customer satisfaction survey. Track the results over time.</p>	Y1 Q4, Y3 Q4	Completed and ongoing.	Middlesex Centre will be including customer service questions in the annual budget survey and will do a full customer service survey once per term of council. Customer survey questions were included as part of the budget survey in July/August 2023.
<p><b>5) Update County GIS Maps</b></p> <p>Improve accessibility of zoning information.</p>	Y1 Q1	Completed and ongoing.	Zoning information is provided for each parcel, and there is a direct link to the zoning description in the Consolidated Zoning By-law.
<p><b>6) Go-to-Market CRM / ERP Systems</b></p> <p>As the Municipality goes to market for replacing its accounting system expand the scope to include software suites that also have CRM functionality.</p>	Y1 Q3 to Y2 Q1	Not started.	Timing for this item will be linked to the procurement of a new accounting system. The customer service data collected during the intervening period will be used to inform the type of system required.
<p><b>7) Update Website</b></p> <p>Revise the website to enhance its ability to provide more self-service functionality.</p>	Y1 Q2 to Q4	Ongoing.	<p>Updates and improvements are made whenever possible. Online webforms are available, with other less frequently used forms available as fillable PDFs. New forms are added as required. Additional self-service options will be incorporated when new accounting software is procured in future.</p> <p>Additional online services include:</p> <ul style="list-style-type: none"> <li>• Cloudpermit – online building and planning service</li> <li>• Univerus – online recreation program registration</li> <li>• Paymentus – online credit card payment service</li> </ul>
<p><b>8) Pilot the use of a Resident Portal</b></p> <p>Pilot the use of a resident portal with a segment of Municipal customers. Based on the pilot's success, rollout the portal to all customers and extend its functionality.</p>	Y1 Q3 to Y2 Q1	Not started.	While webforms allow residents to complete many service requests online, Middlesex Centre does not have a true portal currently. It will be incorporated when new accounting software procured in future.

Recommendation	Suggested Timing	Year 1 (2023) Status	Middlesex Centre Comment
<p><b>9) Pilot the use of Robotic Process Automation (RPA)</b> Use RPA to automate workflows for common customer service processes.</p>	Y2 Q2 to Q4	Not started.	Work on this recommendation is planned for 2024; with a kick-off meeting having already taken place. The costs of this project will be covered in the existing budget.
<p><b>10) Pilot the use of Chatbots / Live Chat</b> Pilot the use of a chat system on the Municipality's website and promoting its use will divert call and email volume and reduce staff time.</p>	Y3 Q1 to Q4	Not started.	This will be reviewed when the website has a major update.

**Analysis:**

Middlesex Centre’s mission is “to deliver the highest standard in municipal services in sustainable professional and innovative manner.” Staff apply this lens to all their work, including the delivery of customer service.

Middlesex Centre receives tens of thousands of calls and emails each year. Staff are striving to meet the timelines and first contact request resolution standards for all incoming calls and queries, and by-in-large are meeting with success. Although the survey offered only a small sample, most respondents were satisfied with the customer service they received.

Middlesex Centre continues to improve the customer service offered. In addition to developing and introducing a new Customer Service Policy, in 2023 all staff received training in various aspects of customer service. Staff have implemented several of the recommendations coming from the Customer Service Review and will address additional recommendations in 2024.

**Financial Implications:**

None. Costs associated with customer service are included in the annual budget process.

**Strategic Plan:**

This matter aligns with following strategic priorities:

- Responsive Municipal Government

Objective 5.1 in the strategic plan is to enhance customer service, with implementing a customer service policy and increasing digital services listed as specific strategies.

**Attachments:**

N/A