



City's Customer Service Delivery Phase One Recommendations

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Prepared For: City Council

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Introduction

The City of St. Albert has always been committed to delivering excellent customer service to the community. As such, the customer service has been identified in the “Organizational Leadership and Culture” document as one of the 6 Paradigm Shifts:

“Excelling at Customer Service Delivery:

Departments, project teams and service delivery functions transform from independent operators to a collaborative and integrated team, supported by first class corporate services. Today, registering for a fitness class, taking out a business license or buying a transit pass requires multiple contact points, forms and payment methods. Tomorrow, we make it easy for residents to access the services they want, we create positive customer experiences and we provide simple connections to City staff when they have questions or issues. Business investors are welcomed and supported.”

The Employee Charter on Organizational Culture also lists the following as one of “Our Commitments”:

“Theme Five:

*We are committed to creating positive customer service experiences
We commit to provide quality and valued service in a collaborative and efficient manner. We have positive interactions with the community and seek to enhance them where possible.”*

The City’s Strategic Plan also makes reference to Customer Service as one of the goals:

“Service Delivery Strategy”

Goal: Create Positive Customer Service Experiences with the community

Strategy: Establish service levels, increase analytical depth and benchmark against comparable municipalities for all community facing services”.

In addition the City’s commitment to customer service is reflected in a number of practices and initiatives including:

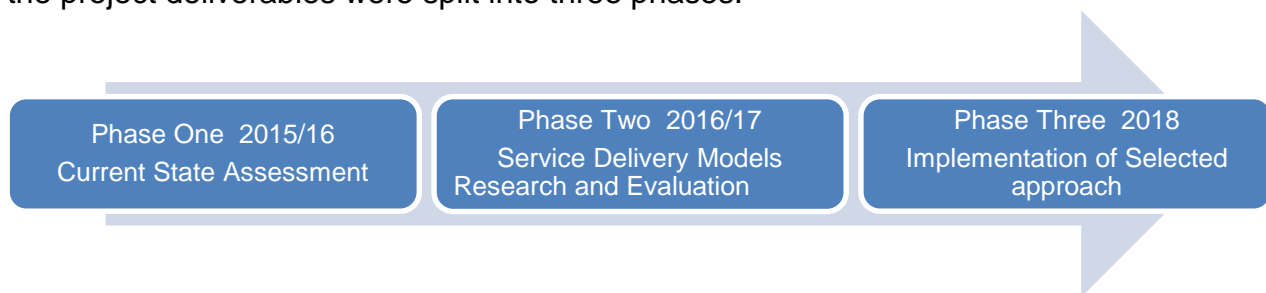
- Community Satisfaction Survey
- Service Level Benchmarking project
- Customer Relationship Management System project
- Smart City Master Plan,

All these initiatives aim to enhance customer service experience with improved service delivery and analytics related to service delivery.

The City is well positioned to build upon this strong foundation in order to enhance the customer service practices and move towards more customer-centric culture and service delivery.

To advance the Customer Service priority, in 2014, the City Manger presented to Council the Customer Service Delivery as one of the Continuous Improvement Projects proposed for 2015. The project was titled “One Window Customer Service” and the objective of the project was to develop consistent standards and practices for customer service delivery, to explore the option of having one access point for all City services and to expand online service offerings.

Due to the organizational capacity at the time; however, this project was delayed and the project deliverables were split into three phases:



Phase One - 2015

The objective of this phase was to engage internal stakeholders and collect information on the current customer service practices and identify areas for improvement regardless of the service delivery model. An implementation plan will be developed for the approved recommendations to gradually implement enhancements to customer service practice and ensure appropriate timing and resources.

Phase Two – 2016/17

The objective of Phase Two, planned for 2016/17, is to research, identify and evaluate strategies for service delivery that would be appropriate for the City now and into the future. This would include public engagement with the community, in order to understand how residents and other stakeholders would like to access City services. A cross-departmental project team and a detailed project plan would be required to ensure proper alignment with Phase One and future work.

Phase Three - 2018

The objective of this phase would be to implement recommendations from Phase One and Two, including a potential new and/or enhanced service delivery model, and online service.

This report provides a number of recommendations developed based on the initial findings. Senior Leadership Team approved recommendations will be implemented to ensure gradual implementation that considers organizational capacity and human and financial resources of the approved recommendations, along with the work of Phase Two planned to take place in 2017.

Recommendations

The following section provides recommendations developed based on the key findings from the Phase One. It is important to note that although a number of these recommendations will be addressed in Phase Two of the project, their implementation may take place over a number of years. More detailed implementation plans for each recommendation will be developed upon Senior Leadership Team's approval and development of the Customer Service Delivery Plan (Recommendation #2).

A. Customer Service Practice and Guiding Documents

Recommendation #1: Form a Cross-Department Customer Service Delivery Team

Form a team of select employees involved in customer service related work and initiatives to work together and advance approved recommendations and to initiate Phase 2 of the project. The team should include representatives from Transit, Public Works, Recreation and Parks, Information Technology and Corporate Planning at a minimum. The Project Manager for Phase Two of the project will manage and facilitate the work of this team.

This recommendation would be implemented upon commencement of the Phase Two project in 2016.

Recommendation #2: Develop Guiding Principles for Customer Service Delivery

Develop guiding principles that will state the City's values and commitments to customer service delivery and provide one source of direction. The guiding principles would provide clear expectations to City employees and the community. This recommendation can be done as a quick win or as a part of the Service Delivery Plan in Recommendation #2.

Recommendation #3: Public Engagement

Conduct public engagement to better understand how residents would like to receive services from the City and what improvements and/or enhancements to service delivery are required in order to meet current and future needs of the community. Use findings in development of the Customer Service Delivery Plan.

This recommendation will be one of the deliverables for Phase Two of the project.

Recommendation #4: Develop the City's Customer Service Delivery Plan

The plan would provide direction for the evolution of customer-centric service delivery at the City. The plan would include key goals for the next 3-5 years and an implementation plan to ensure proper resources are available for gradual implementation of the established plan. The plan would address but not be limited to the following:

1. Service Delivery Model(s) appropriate for City of St. Albert
2. One IT System for Customer Relationship Management

3. Use of technology to enhance service delivery
4. Services available for online delivery
5. Customer service tracking and analytics
6. Customer Service Training

This recommendation will be one of the deliverables for Phase Two of the project.

Recommendation #5: Standardize Customer Service Practice

Customer Service Standards

Have one document for customer service standards that will reflect Customer Service guiding principles and current leading practices as well as include department specific standards unique to department's work so that all departments have the same information, which will assist in value added customer service delivery.

Customer Service Policies

Develop policies, administrative directives and protocols that will provide employees with clear direction required in order to appropriately and consistently interact with customers. These will aid in ensuring that customer service is provided in a consistent manner regardless of a service area. These should be a Council policy and a City Manager directive that will address operational matters.

A more detailed review of potential policies and procedures is required, which will be done in Phase Two of the project; however, the following potential policies have been identified during this initial review:

- Customer Service Delivery
- Dealing with Customers' Concerns including standards for escalating customer concerns and dealing with vexatious (intention of causing annoyance or trouble) customers.

Obtaining customer feedback

Develop a more standardized, corporate approach to obtaining customer feedback, through use of consistent tools used to collect feedback and practices for storing customer feedback. Also, encourage consistent practice for use of this information in order to improve programs and services.

This recommendation will be scheduled for implementation over the next two years.

B. Customer Service Training

Recommendation #6: Introduce Mandatory Corporate Customer Service Training

Develop a corporate customer service training program that will be reflective of the City's customer service guiding principles, policies and plans. . Being that the main purpose of the City is to provide services to residents and/or internal clients, customer service training should be mandatory for all employees and should be customized with different levels of training depending on the position and/or department. A

comprehensive training program framework should be developed to include but not be limited to the following components:

1. Overview of corporate customer service guiding principles, policies and plans and expectations (new employees).
2. Department specific training that would address unique elements of customer service that each department may have including policies, procedures and service standards.
3. Job specific training which would include tactical customer service elements of a job, job shadowing and procedure manuals
4. Ongoing training to enhance customer service delivery at the City and to address identified training needs, such as providing value added services, dealing with difficult customers, etc.

This recommendation could be implemented over the next 2-3 years.

Recommendation #7: Incorporate Customer Service competency into all City job descriptions

It is through its employees that the City is able to provide exceptional customer services. As a result, tying customer service competencies to the City's performance structure is an important component of enhancing this practice

This recommendation will be implemented over the next two years to align with the current work of Human Resources. A "Quick Win" that could be implemented sooner would be Customer Service Training offered through Corporate Learning.

C. Customer Service and Service Delivery Method

Recommendation #8: Evaluate Service Delivery Method

Evaluate the most suitable method for customer service delivery that will include evaluation of one contact point for the City (telephone) as well as potential Customer Service Centres (for key services).

This recommendation will be one of the key deliverables for Phase Two of the project.

Recommendation #9: Improve website to be more customers centric

Review and update Contact and Services section of the website to ensure customer centric approach and consistency within different areas.

Update the list of services to improve consistency with the format in which the information is provided. Look for opportunities to incorporate external services inventory information, specifically service standards (service levels benchmarking project). Evaluate potential of moving E-Services option to the main page so it is more visible. Move City's main telephone line information to more visible spot on the website.

This recommendation could take place in 2016 as one of the "quick wins".

D. Tracking

Recommendation #10: Identify Customer/Client Relationship Management System

Identify client relationship management system that will meet needs of most departments and provide consistent tracking of client profiles, interactions and issues as well as provide analytics and reporting capabilities.

Customer Interaction Tracking, Managing and Reporting practice

Information on customer interaction with the City can provide valuable analytics to Administration that can be used to enhance City's programs, services and service delivery. In addition, it would provide data that can be used to manage and improve department's operation and service deliver.

This recommendation will be one of the deliverables for Phase Two of the project.

E. Obtaining Customer Feedback

Recommendation #11: Further examine the customer feedback collection practice

Review different methods and practices in place for feedback collection and use of information collected to identify opportunities for standardizing this practice across the organization.

F. Quick Wins

Evolving customer service practice takes time and resources, as a result, the above stated recommendations will be scheduled for implementation over the next two to three years. In the meantime, there is a number of "Quick Wins" identified during Phase One of the project that could take place sooner and be implemented to address opportunity areas identified. These quick wins are:

1. *Customer Service Best Practice Document* – This corporate wide document could be shared with all employees through General Managers and Directors as well as through communication on the Vine. This would ensure that all employees are aware of this document and are using it along with their department specific standards for response to inquires.
2. *Customer Reply Standards Document (timelines for responding)* – This corporate wide document could be shared with everybody in the organization in order to increase awareness and knowledge of reply standards in place at different departments.

3. *Client Relationship Management System* - Gather business requirements for the software system that would meet the needs of most departments. This work is already underway by the Information Technology Department.
4. *Website Content Improvement* – Improve content and/or format of existing website to ensure consistency among different departments and web pages. .
5. *Customer Service Training* – Explore opportunity to organize customer service training and offer through the Corporate Learning.