

STAFF REPORT

THE CORPORATION OF THE TOWN OF COBOURG



Report to:	Mayor and Council Members	Priority:	<input type="checkbox"/> High <input checked="" type="checkbox"/> Low
Submitted by:	Brent Larmer, Town Clerk/ Director, Legislative Services Legislative Services Division blarmer@cobourg.ca 905-372-4301 – Ext.4401	Meeting Type:	Open Session <input checked="" type="checkbox"/> Closed Session <input type="checkbox"/>
Meeting Date:	November 27, 2023		
Report No.:	Legislative Services-116-23		
Submit comments to Council			

Subject/Title: Customer Service Strategy Update and Preliminary Steps

RECOMMENDATION:

THAT Council receive the staff report for information purposes; and

FURTHER THAT Council endorse the introduction of a Centralized Customer Services Desk located within the front foyer of Victoria Hall in the current location of the existing Security Desk at a cost of \$15,000 to be funded through the 2023 approved capital budget for Victoria Hall renovations and upgrades; and

FURTHER THAT Council direct Staff to work with the Heritage Planner and the Victoria Hall Volunteers on the selection of colours (desk top and cloth) for the Centralized Customer Services Desk to ensure the desk is complimentary to the foyer and the previous agreed upon coloring of the current desk.

1. STRATEGIC PLAN

On November 13, 2023, Town of Cobourg Council approved and endorsed the Town of Cobourg Strategic Plan 2023 – 2027 and Beyond.

Strategic Priorities:

- Thriving Community
- **Services Excellence**
- Sustainability

Service Excellence Strategic Actions:

- 1. Assess points of contact with customers to identify ways to streamline communications, increase stakeholder engagement, demonstrate user friendliness and provide optimal service**
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- 4. Develop and implement Key Performance Indicators and Continuous Improvement Plans for municipal programs and services to measure Customer Satisfaction, Community Impact and Efficiency**

Is this improving services for residents and customers?

This proposal is a direct recommendation from the Town of Cobourg approved Customer Service Strategy. Through employee, stakeholder, resident, and customer feedback, the Customer Service Strategy provided recommendations on how front-line customer services at Victoria Hall can be improved and delivered efficiently and effectively. This report outlines a service operating model to improve service delivery through first point of contact with customers when engaging with the Town at Town Hall.

Is it making best use of technology?

The proposal will assist in leveraging existing technology (cityworks) for tracking and documenting customer interactions and information. The intent is to improve the speed and accuracy of staff responses to customer questions through documentation and the centralization of information. Questions and their appropriate responses will be shared across municipal customer service counters. Common questions and misunderstandings can also be shared with the Communications department to flag areas where greater outgoing communication support may be required.

In addition, the recording of all customer questions will assist the Town of Cobourg conduct end-of-year reporting that can be shared with Council and used to support annual Operating Plans and budget recommendations.

Is it making it easier for residents to access services they need and want?

The proposal will initiate the transition to a centralized service model to help 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.

Is this making us more inclusive, equitable and accessible?

The Town of Cobourg is committed to building an inclusive society and providing an accessible environment in which all individuals have access to the Town's services and programs in a way that respects the dignity and independence of people with disabilities. With the introduction of the Centralized Customer Service Desk, services would be more accessible as inquiries and first point of contact could occur on the main ground level at an accessible service counter. Not all

current service counters are accessible, and the introduction of this centralized service will improve customer service accessibility.

Is this building our capacity to deliver?

Victoria Hall is at the heart of the Town of Cobourg and is the central destination for residents seeking information. Victoria Hall is also where all essential government services are located, including where Council meetings are conducted. This proposal requests permission to start the preliminary steps to implement the Customer Service Strategy and Implementation Plan to create a centralized service desk in Victoria Hall. The Centralized Customer Service Desk will serve to greet residents and visitors, help them navigate municipal services and assist in addressing inquiries in one location.

The recommended centralized service model for the Town will result in many benefits to the organization.

The major benefits can be categorized as follows:

- Approved ability to track 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.

This proposal outlines an initial step to enhance the Town of Cobourg Customer Service Strategy and will directly contribute to the strategic pillar, Service Excellence, as outlined in the Town of Cobourg Strategic Plan 2023 – 2027 and Beyond.

2. PUBLIC ENGAGEMENT

This recommendation is being derived from the Council approved Customer Service Strategy and Implementation Plan which was developed using several public engagement tactics including:

1. Employee Stakeholder Interviews
 - Facilitated virtual 1-hour interviews and group workshops.
 - 36 internal stakeholders were conducted with Councillors (previous term and newly elected members), Directors, Managers, and front-line staff.
2. Customer Focus Groups
 - Facilitated 60-minute virtual customer focus-groups.

- Four (4) focus groups were conducted that included Businesses, Tourists, Developers, and Resident groups.

3. Employee Survey

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

4. Customer Survey

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

Ongoing Customer Service Feedback Survey:

On August 22, 2023, the Town of Cobourg launched a new customer feedback survey to measure customer satisfaction and inform improved customer service delivery across all municipal services. To better understand and address the needs of its customers, residents are invited to share their thoughts on customer service in the Town of Cobourg. Feedback will be used to inform the final draft of the Corporate Customer Service Standards.

The survey takes less than two minutes to complete and seeks to identify:

- overall customer service experience at the Town
- types of customer experience interactions individuals had with the Town
- overall level of satisfaction with customer service
- suggestions for areas of opportunity in customer service

The survey is available online, and is planned to be incorporated at a future date into all staff outgoing emails, so members of the public can provide feedback to the Town once directly receiving service from the Town. The message is as follows:

The Town recognizes the value of public input and seeks feedback and compliments to ensure continuous improvement. [We would like to invite you to participate in a short survey about your recent experience.](#)

Further, the continuing availability of the survey will provide ongoing data to assist town staff in advancing customer service provided by the organization. Below are two preliminary extracts of the ongoing Customer Service Survey that help support the recommendation. To date we have had 145 responses. 64% of respondents were satisfied with the service that they were provided, indicating responses ranging from “okay” to “great”. Of the 145 responses received, 87 received in-person service and 42 received services over the phone.

1. How was your most recent experience with the Town of Cobourg?

[More Details](#)

[Insights](#)

● Bad	28
● Not good	23
● Okay	19
● Good	28
● Great	44



3. How did this experience happen? Choose all that apply.

[More Details](#)

● Email	55
● In person	87
● Over the phone	42
● Town website	17
● Virtual or hybrid meeting	6



This data collected as shown above, is only the first step in receiving real statistics on customer feedback for the Town of Cobourg. The questions and specific data collected will continue to be updated as the Town starts to build the Customer Service Policy and Customer Service Standards moving forward. All data will be consistently gathered, and Council will receive a Customer Service Report Card at the end of each year.

Heritage and Victoria Hall Volunteers Engagement:

Town Staff have reached out to the Victoria Hall Volunteers and the Victoria Hall Maintenance Trust and have provided the plans to update and upgrade the current foyer main desk to better service the public and provide for more centralized Customer Service. Staff have received no objections to the proposal and look forward to providing information to the groups on ways this new first-point of contact proposal would help to promote the history of Victoria Hall. Staff recognize and appreciate that Victoria Hall is a celebrated National Historic Site. With the introduction of a Centralized Customer Service Desk, information regarding the history of Victoria Halls development can readily be shared with incoming guests and the doors to the James Cockburn Room and Courtroom can more confidently be left open for public enjoyment.

In addition, Staff have internally consulted with the Heritage Planner on any concerns related to the easements on Victoria Hall with Heritage Canada. The Planner and department have no concerns with the proposal but are happy to provide additional input as the project progresses.

3. PURPOSE

The purpose of this staff report is to receive Councils endorsement on a recommended action from the approved Customer Service Strategy and Implementation Plan, being the implementation of a Centralized Customer Service Desk.

The Customer Service Strategy and Implementation Plan is intended to be an actionable guiding document to address service delivery gaps and modernize the way the Town of Cobourg serves its residents and businesses. The recommended action of this report will allow for the Town to prepare additional deliverables outlined in the strategy while assisting current front-line staff deliver customer service daily.

4. ORIGIN AND LEGISLATION

The Customer Service Review Project started during the previous term of Council under the following strategic planning objective: *Objective #4 – to Improve Customer Service*. Customer Service was also addressed in the Town of Cobourg Service Delivery Review and Organizational Review.

In 2021, an Organizational Review was conducted by KPMG who provided comments and a review of Customer Satisfaction at the time. KPMG noted while the Town’s strategic plan identifies improving customer service as a strategic priority (with responsibility assigned to all Departments), it currently does not have a dedicated customer service function (responsibility is currently assigned to Legislative Services) or a formal customer service strategy. In the 2021 report, KPMG noted, based on the preliminary findings related to customer satisfaction, the results of the survey arguably demonstrate a need to focus on enhancing customer service.

5. BACKGROUND

On May 23, 2023, Council approved the final Customer Service Strategy and Implementation Plan for the Town of Cobourg as follows:

WHEREAS at the Committee of the Whole meeting on May 15, 2023, Council considered a memo from the Manager of Strategic Initiatives /Customer Service, regarding the Customer Service Strategy and Implementation Plan Final Report Delivery;

NOW THEREFORE BE IT RESOLVED Council receive the Final Customer Service Strategy and Implementation Plan for the Town of Cobourg as prepared and delivered by the Customer Service Professionals Network (CSPN), as funded through the Municipal Modernization funding Phase Three (3); and

FURTHER THAT Council direct staff to review the recommendations contained in the Final Customer Service Strategy and Implementation Plan and provide a report back to Council with an implementation program based on available financial and staff resources and corporate priorities.

6. ANALYSIS

Residents have increasing expectations of municipal service delivery and there is a direct correlation between service delivery satisfaction and perception of good government. Since the approval of the Customer Service Strategy, Staff have been working on identifying the next steps and developing a Town initiated and detailed implementation program for Customer Service Delivery across the corporation. Although this is not the full implementation program and Town proposed implementation plan, the proposal being recommended in this report is setting up the Town for future delivery and asks that existing budgeted funds be used to construct and put into place the Centralized Customer Service Desk and begin the process to create centralized and consistent customer service.

The Town of Cobourg currently has a siloed approach to Customer Service and there is no corporate Customer Service Policy or Customer Service Standards in place. In addition, each individual division/department is responsible for their front department area and responds to their ‘customers’ in their own way. Currently staff are all contributing to maintaining coverage within their front service counters on top of other completed department priorities. In summary, Customer Service Standards and delivery isn’t necessarily a priority and being consistently provided in a standardized approach.

Below is the recommendation within the approved Customer Service Strategy and Implementation Plan that is related to the staff recommendation:

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

<p>customer inquiry that could be completed by one person.</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>errors, and duplication of effort</p> <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 <p>Implementation Costs: \$1,000 - \$5,000 (Support from third-party vendor to construct desk)</p>
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The recommendation to centralize customer service is intended to be in addition to existing frontline departmental front desks. This proposal is not meant to replace these current operations and departmental areas will continue to be accessible to the public. The end goal is to better manage the volume of customer interactions into a single point of contact and to better track service delivery data, metrics and KPIs so the Town of Cobourg has a better understanding of the resourcing needs for delivering services on regular basis and what method needs to be invested in.

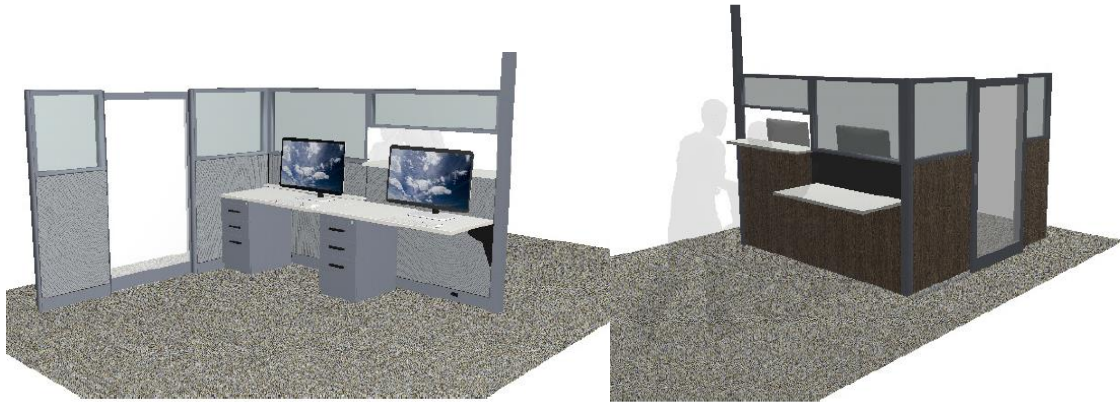
A recommendation being presented collectively by the Directors Team, and is supported through a spotlight recommendation in the Customer Service Strategy and Implementation Plan, is that the Town incorporate a Centralized Customer Service Desk at the entrance of Victoria Hall. The desk should be strategically positioned (in its current place) to be the first point of contact for customers/residents entering the building. Currently there is a basic front desk that Security uses in the evening when Victoria Hall is open past 4:30 P.M. and this will continue to occur until the full implementation of the centralization is in place.

If approved by Council, and once the Manager of the Office of the CAO (formerly the Manager of Strategic Initiatives and Customer Service) is hired, this Customer Service Area will be managed by the Chief Administrative Officers (CAO) Office. This will be the first stage within the Customer Service strategy roll-out to manage initial customer contact across multiple channels that exist in Victoria Hall and that are general in nature to meet the current needs within customer service.

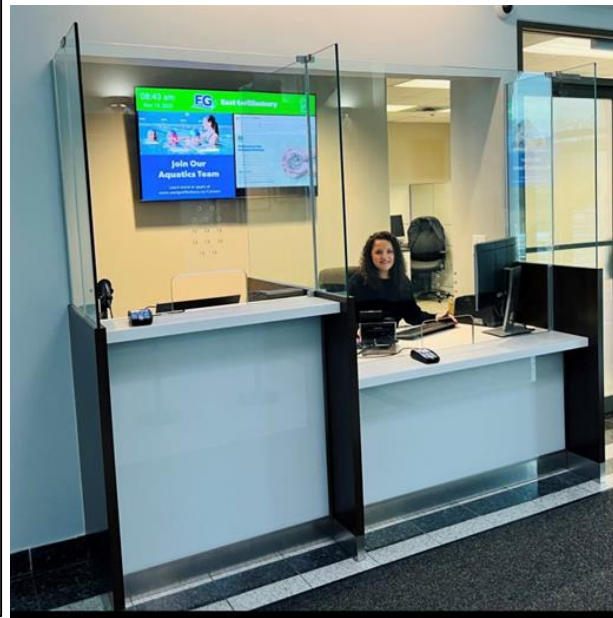
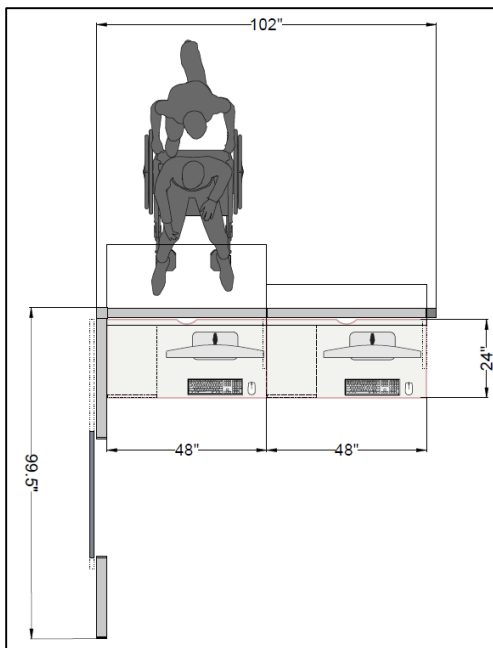
The current position of Manager, Customer Service/Strategic Initiatives is vacant and has been realigned to become the Manager, Office of the CAO to be

advertised and hired at the beginning of the year in 2024, this position is an existing but vacant position, and at the direction of the CAO has combined the two positions of Manager of Customer Service/Strategic Initiatives with the Org Review approved position of Manager of the Office of the CAO. This results in considerable cost efficiencies for the Town, and will still realize the strategic deliverables endorsed by Council in the current Strategic Plan while realizing costs savings for the tax payers. The job description, title and location in the organization has been updated to realize these efficiencies. This position will be responsible for the roll-out and onboarding of the next steps in the Customer Services Implementation Plan.

Below are examples of the Customer Service station proposed for the Centralized Customer Service Desk:



Front and rear rendering of proposal



*Example from Municipality of East Gwillimbury showing accessible design.
Credit – LinkedIn*

7. FINANCIAL IMPLICATIONS/BUDGET IMPACTS

There is a onetime purchase and installation cost \$15,000 to complete the installation of the Centralized Customer Service Desk. This project will be funded through the 2023 Capital Budget approval – Victoria Hall Renovations. This cost will also include the introduction of the workstation technology and signage to identify the space.

As noted in the Customer Service Strategy and Implementation Plan, the introduction of a centralized location could see the following cost savings:

ID	Recommendation Name	Estimated Efficiency Savings (Hrs)	Estimated Cost Savings (\$)	Estimated Implementation Costs (\$)
3A	Create a Centralized Customer Service Desk	750 +	\$30,000 - \$50,000	\$1,000 - \$5,000

Future costs:

Looking forward to the future plans and the introduction of the permanent use of the Centralized Customer Service Desk, staff will be presenting a budget request that will be in-line with another Customer Service Strategy recommendation - **3B – Onboard Two (x2) Additional Customer Service Focused Resources.**

Staff will be requesting one (1) Full-time Victoria Hall Customer Service Representative and a Summer Student position to support the front office and assist with the busy summer season.

The Customer Service Representative will primarily be responsible for a wide variety of clerical office duties in support of general inquiries and customer service to members of the public. This role will act as a first point of contact and provide general information to staff, customers, and the public. This position will be located at the customer service desk in Victoria Hall and provide customer service functions; providing assistance/information to public in courteous, friendly and efficient manner to maintain a high standard of professionalism and public relations at all times. Divisional staff from other areas will also be spending time supporting the front desk activities as key Divisional times, for example, Finance representatives during tax due dates or other key times for the Corporate Services Division, as well as staff from Legislative Services, or other Town Departments. This will ensure desk coverage, as well as cross training of all customer service staff and will contribute to the no wrong philosophy of customer service that we will be building through the implementation of the strategy.

Cobourg Service Desk (Entry Point)

- The Cobourg service desk acts as the first point of contact for all customers entering the building at 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)

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)
 - Resources: Coverage for the Service Desk, One (1) Full-Time, Cross-Trained Customer Service Representatives available during operating hours and Summer Student to assist with Summer Season.

8. CONCLUSION

A commitment to the implementation of the Customer Service Strategy and Implementation Plan is essential in moving the Town of Cobourg towards becoming an increasingly customer-focused organization and will assist Council in meeting the strategic priority of *Service Excellence* as set out in the Town of Cobourg Strategic Plan 2023 – 2027 and Beyond.

Staff is looking for Council’s approval and endorsement of moving forward on one (1) of the recommendations of the Customer Service Strategy in 2023 to prepare for the more in-depth implementation phase to occur in 2024 that will continue to be in-line with Councils Strategic Plan.

Report Approval Details

Document Title:	Customer Service Implementation Plan 2023 -2024 - Legislative Services-116-23.docx
Attachments:	
Final Approval Date:	Nov 23, 2023

This report and all of its attachments were approved and signed as outlined below:

Tracey Vaughan, Chief Administrative Officer - Nov 23, 2023 - 12:39 PM