



## STAFF REPORT

THE CORPORATION OF THE TOWN OF COBOURG

# Corporate, Finance, and Legislative Standing Committee

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Report to: Mayor, Deputy Mayor, and Councillors  
From: Chris Challenger, Manager, Office of the CAO  
Standing Committee Date: June 6, 2024  
Report Number: CAO-2024-003  
Council Meeting Date: June 26, 2024  
Subject: **Customer Service Strategy & Implementation Plan**

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### 1. Recommendation:

THAT Council review and approve the Customer Service Strategy and Implementation Plan; and

FURTHER THAT Council direct staff to implement the recommendations contained in the Customer Service Strategy and Implementation Plan.

### 2. Executive Summary:

Staff have reviewed the “Customer Service Strategy and Implementation Plan” (CSSIP) completed by Customer Service Professional Network (CSPN) and offer the following comments with respect to the recommendations contained in the final CSSIP report. Staff have provided rationale for recommendations that deviate from the consultants’ final report.

Key recommendations related to improving the customer experience in this staff report include the following:

1. The development of a first ever Customer Charter for the Town of Cobourg
2. The development of KPI's that are tied to the Customer Charter and will be publicly reported.
3. Development of a customer service, escalation, and complaint policy
4. The introduction of a streamlined "Service Cobourg" Model for all service requests and inquires.
5. Procuring a Customer Relationship Management (CRM) system
6. The introduction of a triage system to efficiently deal with service requests, removing routine customer service requests from departments.
7. Installation of a new service desk in the main foyer of Victoria Hall to be staffed by dedicated Customer Service Representatives (CSR's).
8. Setting the goal of having 70% of all service requests resolved by the CSR's at the first point of contact.

### **3. Background**

Improving customer service at the Town of Cobourg (the Town) was identified as a key priority in the development of Council's 2023-2027 Strategic Plan. To support the implementation of this priority, staff ran a competitive RFP to select a consultant to deliver customer service improvements for the Town. CSPN was the successful proponent of the RFP, and delivered the CSSIP. The final CSSIP was presented at the May 23<sup>rd</sup> 2023 committee of the whole meeting.

Staff have presented two reports to Council regarding the CSSIP. As a refresher for members of Council and the public, the two motions passed by Council are below for reference.

At the May 23<sup>rd</sup> 2023 committee of the whole meeting, the committee passed the following motion;

THAT Council receive the staff report for information purposes; and

FURTHER THAT 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.

Committee of the Whole (Victoria Hall Desk)

At the November 27<sup>th</sup> 2023 Committee of the Whole meeting, the Committee passed the following motion:

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 and Victoria Hall Maintenance Trust on the selection of the Colour finishes 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 that is in Victoria Hall; and

FURTHER THAT Council direct staff to engage the design of the Centralized Customer Services Desk with the Town of Cobourg Accessibility Advisory Committee.

#### **4. Discussion:**

Staff have reviewed the consultant's report and offer the following comments with respect to the recommendations contained in the final CSSIP report. Staff have provided rationale for recommendations that deviate from the consultants' final report. The consultants' recommendations have been provided in bold, with an accompanying staff response underneath.

#### **Consultants Recommendations and Staff Response**

##### **1A Develop Customer Service Vision and Guiding Principles**

Staff agree with this recommendation and propose that the Town develop its first-ever customer charter. A customer charter is a formal document that would outline the Town's commitments and promises to its customers regarding the quality and standards of service they can expect to receive. It serves as a public declaration of the Town's dedication to providing excellent customer service, transparency, accountability, and continuous improvement.

A customer charter typically includes details about the organization's mission, vision, values, service standards, and procedures for handling customer feedback and complaints. It would act as a guiding framework for staff interactions with customers and reinforce the Town's commitment to meeting their needs and expectations.

By implementing a customer charter, the Town will embed a customer-centric culture at the center of everything it does.

**1B Align Employee and Customer Service Performance Measurements with Customer Service Strategy and Standards / Levels.**

Staff agree with this recommendation and propose that The Town establish clear, measurable KPI's that reflect the proposed customer service charter. Examples can include metrics around standard response times to resident emails, phone calls, and time to process complaints.

For non-union positions, staff will consider incorporating customer service metrics into annual employee performance reviews. This integration will ensure that employees are consistently aware of their performance in relation to the Town's customer service charter. By aligning employee performance standards with customer service standards, the Town will foster a customer-first mindset among staff. A practical example of how to implement this could include employees setting one customer service-related goal in an employee's annual performance plan to emphasize the importance.

**1C Develop a formal customer insight gathering procedure and processes to solicit customer feedback / satisfaction.**

Staff propose redeveloping the existing customer satisfaction survey to better align with the proposed customer charter and KPIs. This updated survey will be a valuable tool for measuring customer satisfaction and performance metrics against established standards. The collected data can be presented on the Town's website in the form of a dashboard with other publicly reported metrics.

Staff will offer multiple ways for customers to access the survey. For example, a link to the survey can be included in email signatures, it can be made available on the Township's website, and paper copies can be provided at Victoria Hall, the CCC, and other Municipal facilities.

**1D 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.**

Staff agree with this recommendation and propose the introduction of a Customer Service, Complaint, and Escalation Policy (CSCEP) to implement the consultants' recommendation.

The CSCEP will formalize the complaint process, offering clear guidance for both staff and the public on how to make a complaint, the steps involved in handling a complaint, timelines, and possible actions to address the complaint. A standardized complaint procedure will be applied across the entire organization, and a standardized, accessible format for

receiving complaints will be introduced. This will include both an online and paper-based option for submitting a complaint. Through the proposed CSCEP, staff will also track complaints as they relate to service levels provided by the Township. Examples could include Town parks not receiving enough maintenance, or the frequency of Cobourg Transit.

The proposed policy will also provide direction on how residents can submit general feedback to the Township, as well as how residents can provide special thanks to a staff member for their work.

**2A Define a Customer Service Performance Measurement Framework aligned to Corporate KPIs (including technology solution and governance).**

Staff agree with this recommendation and will incorporate measurable KPIs aligned with the proposed customer charter. The specific KPIs will depend on the capabilities of the CRM system the Town selects. As staff evaluate CRM systems, staff will ensure the chosen solution can gather the necessary data to measure proposed KPI's.

**2B Review and finalize the proposed Customer Service Policy**

Staff have reviewed the proposed customer service policy that was provided by CSPN as part of the Final report. Staff are proposing to take the customer service policy a step further and include a clear process for complaints and escalations, given that they're all closely related. Staff are proposing the introduction of a customer service, complaint, and escalation policy as previously mentioned.

**2C Develop department-level service standards for all department processes (responsibility to be maintained by each department). Leverage corporate standards to tailor to individual departments.**

Staff agree with this recommendation and will develop department level KPI's that align to the Town's corporate KPI's. Department level KPI's will be established after corporate level KPI's are in place. There will be limitations on the types of department-level KPI's that can be reported on as the Town has technology limitations. Staff acknowledge that response times for many municipal requests (e.g., FOI requests, building inspections, planning applications) are governed by Provincial legislation. Therefore, any department-level service standards for these processes must comply with applicable Provincial regulations.

**3A Create a "Service Cobourg" centralized customer service desk at Victoria Hall as a singular entry point for customers. Create a single phone and email contact for the service function. The service desk**

**will leverage the existing infrastructure in the main lobby at Victoria Hall. (Spotlight Recommendation)**

Staff support this recommendation, and a new service desk has been ordered and installed in the foyer at Victoria Hall. The new CSR's will be staffed in the new Customer Service Desk at Victoria Hall and will be the first point of contact for anyone entering the building.

Staff support the 'Service Cobourg' model, and will migrate towards a single point of contact for the Town. Staff will start by redirecting all administrative phone lines for departments to the main Victoria Hall switchboard and will start removing those phone numbers from public facing places such as the Town's website. The Town will limit the number of staff phone numbers available on the website, and will actively promote a "one number" for all Township requests. There will be no changes to the after hours (24 hour) contact number for the Town.

Staff will initially use the existing customerservice@cobourg.ca email as a single point of contact for the Town. Staff will introduce a new "Service Cobourg" email that will be promoted to the public and be monitored by the new CSR's.

Staff are also proposing to introduce a "triage" system to deal with all service requests as follows:

The triage system will allow the new CSR's to route service requests to the appropriate department or person when they cannot answer the inquiry themselves. The goal is to have 70% of inquiries resolved at the first point of contact with the new CSR's. Below provides a brief overview of how the triage system will operate.

Level 1 - This represents most of the service requests and inquires to the Town. The goal is to have 70% of these requests resolved by the CSR's at the first point of contact. Examples would include but are not limited to; issuing parking passes, taking tax payments, selling concert hall and box office tickets, responding to questions about burn permits, helping to navigate the Town's website. This will significantly free up staff time by removing routine customer service-related requests from their day to day work. The Manager, Office of the CAO will work with staff in all departments to develop comprehensive training materials for the new CSR's. Examples will include standardized FAQ's that will live on SharePoint and be updated over time.

Level 2 in the triage system will be for more complex inquiries that need to be handled by the respective departments. Examples of these inquiries could include questions specific to the issuance of building permits, or planning related items where subject matter experts or qualified professionals are required to answer these questions. The new CSR's can assist residents and businesses to book meetings with Township staff, as

appropriate. Part of the training will emphasize at what point the CSR's must hand over inquiries to a respective department.

Level 3 in the triage system will be for urgent, non-emergency actions that require the immediate attention of the Township. Some examples could include traffic lights that aren't functioning, a tree blocking a roadway, or vandalism to Township property. The new CSR's will triage these issues directly to management for immediate action. There will be instances in which more than one Town department needs to be involved. The CSR's will be responsible for ensuring all relevant parties are notified.

**3B Close off individual department service desks and require an “appointment only” approach to in-person service interactions.**

Staff partially agree with this recommendation. Staff support consolidating the first point of contact for all foot traffic at Victoria Hall into the new customer service desk in the main foyer. However, staff do not agree that all service requests should require an appointment. For example, staff in Legislative Services process marriage license applications without appointments, and this practice will continue. Staff do support requesting appointments for more complex inquiries, such as questions pertaining to building and planning applications, where the request necessitate staff time for review prior to providing an answer.

Staff do not support closing the customer service desks that are outside of Victoria Hall (i.e. Building 7, Venture 13, Cobourg Fire, the CCC). As discussed with the respective departments, aside from the CCC, the customer service desks outside of Victoria Hall see minimal foot traffic from residents. Most service requests coming in are via phone and email, and redirecting those requests to the new CSR's will provide savings for the Town, not the closing of service desks.

**3C Remove contact information from public facing sources that allows customers direct access into individual departments.**

Staff agree with this recommendation and will limit the publicly available information for departments, including emails and phone numbers. Staff will replace those department specific contacts with the new “Service Cobourg” contact information, and will encourage residents to contact Service Cobourg.

**3D Relocate teams to the basement of Victoria Hall to fully utilize the free rooms that are available. Relocate records to the library to allow for more office space in the basement.**

At this time, staff do not support this recommendation. The proposed space in the basement of Victoria Hall cannot support the return of staff in

its current condition, and would require a significant renovation. Any renovations to the basement at Victoria Hall would need to be included in a future capital budget. Staff are evaluating alternatives that would allow more employees to operate out of Victoria Hall, while minimizing capital costs for the Town. Considerations include expanding the flexible work policy, introducing shared workspaces, and hoteling stations. Staff support the principal that having more employees operating out of a common building will help build organizational culture and drive efficiencies.

**3E *Modify operating hours and services delivered in the Cobourg Community Center. Close certain services depending on the time of day. Add signage in the Cobourg Community Center on who customers can call to get questions answered.***

Staff do not support a reduction in operating hours or services provided at the CCC. With approximately 1,000 visitors daily, the CCC serves as a vital community hub, especially for Seniors. Additionally, the Township receives grants specifically tied to providing a minimum level of in-person customer service to seniors. Reducing the service levels could make us non-compliant with the grant terms.

Staff will consider the feasibility of expanding the services provided by staff at the CCC. Practical examples could include having CCC staff issue waterfront parking passes or accepting tax payments. Staff working at the CCC already take payments, process registrations, and book spaces when required. With a significant number of seniors utilizing the CCC, staff view this as an opportunity to meet our customers' "where they are." This would serve to increase the customer experience, especially for our Seniors who frequently rely on in person interactions. This will also support business continuity and operations for the Township.

**3F *Close in-person customer access to Public Works (Building 7)***

Staff do not agree with this recommendation. The Manager, Office of the CAO met with the Director of Public Works to discuss closing the in-person counter at Building 7. Given Building 7's location in an industrial park, the building sees little foot traffic from residents. Traffic to the building primarily consists of deliveries and external stakeholders attending meetings. Closing the front counter would not result in material savings, as the Public Works Admin's desk also serves as the reception desk. Maintaining a front counter at Building 7 will ensure that B2B functions continue effectively.

Public Works identified the high volume of repetitive calls and emails (e.g., how to book the bus,) as the primary time-consuming tasks for staff, rather than in-person visits. Redirecting these inquiries to the new CSRs will create efficiency and savings. This will free up valuable staff time in Public Works, allowing them to focus on more complex tasks instead of routine customer service inquiries.



**3G Relocate Economic Development to the Victoria Hall to be closer to Planning**

As mentioned previously, staff are evaluating alternatives that would allow more employees to operate out of Victoria Hall while minimizing capital costs for the Town.

**4A Design and deploy CRM System for Customer Service function. (Including governance and functionality for tracking new recommended metrics). (Spotlight Recommendation)**

Staff agree with this recommendation. Funding has been included in the 2024-2025 operating budget to cover the annual licensing costs for a CRM system. A CRM system will allow Township staff to consolidate service requests, track metrics, and provide an overall system that will improve the customer experience.

**4B Conduct a detailed technology review of current tools, systems, and integration capabilities.**

Staff agree with this recommendation. Currently, the Township has engaged Baker Tily to conduct an in-depth IT Gap Analysis. The IT Gap Analysis will provide a detailed review of the current and future IT needs for the Town. This work will inform what a future CRM system will look like for the Town, and how it would integrate with current and future IT systems.

**4C Make improvements to the utilization of SharePoint as a centralized repository tool for information access and sharing needed to deliver customer service.**

Staff agree with this recommendation and will work with corporate services on how to make improvements to SharePoint, including enhanced options for governance and training on the use of SharePoint.

**4D Increase self-serve capabilities through online channels / access to key municipal services. This can include e-permitting and digitized payment functions to be completed vis online / self-serve tools.**

Staff agree with this recommendation. Staff have been working to implement self-serve technology solutions that enhance the customer experience, and provide a savings for the Municipality. Examples include the introduction of Cloud Permitting for all building permits, and Cobourg's On-Demand Transit Service App. Staff will continue to provide more self-serve and online tools as resources become available to do so.

**4E Update website with sections that have the most pressing information and high-volume interactions to reduce interaction volumes into the Town for simple requests.**

Staff agree with this recommendation. The Town will be transitioning to a new platform, Govstack, in hopes to re-launch the corporate website, Cobourg.ca later this year. Govstack is a modern content management system providing more powerful options for layout and design. Staff recently conducted a survey (April 11<sup>th</sup> – May 3<sup>rd</sup>) on the engage Cobourg website to solicit stakeholder feedback on how the Town can make improvements to the website. This feedback will be used to help inform the design of the website.

**5A Perform a succession planning assessment to identify current and future resourcing needs. Develop tailored career development and advancement programs for employees.**

Staff agree with this recommendation and are looking at options to complete a succession planning assessment.

**5B Design and deliver organization wide training program to address identified gaps in skills / competencies (Spotlight Recommendation).**

Staff agree with this recommendation. Staff will conduct an audit to identify skills and competency gaps as it relates to customer service at the Town. The audit will inform the type and level of training that will be required. Staff will work with HR on proposed training programs to increase customer service levels at the Township.

**5C Design employee recognition program to recognize employee achievements and promote high performance culture.**

Staff have implemented this recommendation.

**5. Financial Impact and Budget**

The Town has 15K budgeted in 2024 to pay for the supply and installation of the new customer service desk and associated equipment at Victoria Hall. Staff anticipate that the new customer service desk and equipment will come in on budget.

The 2024 operating budget contains approved funding for (1) dedicated CSR, their IT equipment, and training. Staff have included 50K in the 2025 operating estimates for the CRM system.

**6. Relationship to Council’s Strategic Plan Priorities 2023 to 2027 and beyond:**

Thriving Community

Service Excellence

The customer service strategy and implementation plan will fundamentally overhaul the customer experience for residents in the Town of Cobourg. The focus on streamlining communications, utilizing new technologies, and implementing KPI’s are direct actions in Councils strategic plan.

Sustainability

**7. Public Engagement:**

The public will have just over 4 weeks to provide comments from the posting of this report.

**8. Attachments:**

None

**Report Approval Details**

Document Title:	Customer Service Strategy and Implementation Plan .docx
Attachments:	
Final Approval Date:	May 29, 2024

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

**Tracey Vaughan, Chief Administrative Officer - May 29, 2024 - 2:47 PM**