

January 2021



# 2020 Municipal Customer Service Review

## Final Report

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# Executive Summary



## EXECUTIVE SUMMARY

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- Citizen expectations of municipalities are increasing across Canada due to innovations in neighbouring jurisdictions and the private sector, which is requiring public sector leaders to keep pace with the change
- As the Town of Midland (the “Town”) strives to best serve its constituents, a Customer Service Review was approved to assess its internal service landscape’s effectiveness of meeting and exceeding citizen/customer needs
- The Town engaged the advisory team at the Customer Service Professionals Network Inc (“CSPN”) to complete a review of the Town’s approach to customer service with the purpose of identifying critical service delivery improvement areas
- Based on desktop, primary, and immersive research, **CSPN identified four Strategic Categories** to evaluate and provide recommendations within: 1) Strategy & Vision, 2) Talent, 3) Processes, and 4) Digital
- CSPN identified 28 key findings and has suggested 25 recommendations, of which 5 have been prioritized:
  1. Clarify the Town’s **Customer Experience (“CX”) Vision**
  2. Provide Customer Service and Service-Design **Training for Employees**
  3. Build an **Organizational “Triage” Support Tool** to help direct customers to the right person, right away
  4. Launch a **Customer Relationship Management (“CRM”)** platform to serve as a central data repository
  5. Launch a **Workflow Automation (“WFM”)** platform to streamline multi-step manual processes
- CSPN has reviewed the Town’s progress towards ongoing strategic initiatives and attempted to prioritize the most impactful changes that will drive long-term value to customers and the Town
- Overall, CSPN observed a Town with ambitious growth aspirations in terms of population and service design, which will require investments in the right growth platforms to drive service improvements and results

## EXECUTIVE SUMMARY

CSPN’s research methods leverage **Lean Six Sigma (“LSS”)** and **Human-Centered Design (“HCD”)** principles to uncover both the operational and people side of Customer Service Experience. This unique and multifaceted approach includes qualitative, quantitative and ethnographic research activities to uncover a 360-degree view of perspectives while providing a rigorous, structured approach to data capture and analysis.

The following activities were conducted to drive effective collaboration and produce quality insights.

### Overview of Project Research Methodology



## EXECUTIVE SUMMARY

To help guide the 2020 Municipal Customer Service Review, CSPN identified **four Strategic Categories** for structuring **analysis and recommendations** that include: 1) Vision & Strategy, 2) Talent, 3) Process, and 4) Digital. Within each of the categories, an overarching mindset has been identified to showcase the Customer perspective.

### Overview of Strategic Categories

#### Strategic Categories





## EXECUTIVE SUMMARY

Based on the research and analysis conducted, CSPN has identified **28 Key Findings** and **25 Recommendations** for consideration by the Town that will help enhance customer / citizen service.

### Overview of Key Findings & Recommendations

| Category   | Key Findings  | Recommendations   |
|--|---|---|
|  <p><b>Vision &amp; Strategy</b><br/>Describes how the Town develops and manages customer-focused Strategic Initiatives</p>   | <ul style="list-style-type: none"> <li>• <b>7</b> Key Findings &amp; Observations Identified</li> </ul> | <ul style="list-style-type: none"> <li>• <b>6</b> Improvement Opportunities Identified</li> </ul> |
|  <p><b>Talent</b><br/>Describes how the Town mobilizes “Human” resources to drive great Customer Service</p>                  | <ul style="list-style-type: none"> <li>• <b>8</b> Key Findings &amp; Observations Identified</li> </ul> | <ul style="list-style-type: none"> <li>• <b>5</b> Improvement Opportunities Identified</li> </ul> |
|  <p><b>Process</b><br/>Describes how the Town structures services and Processes to deliver on Customer Service needs</p>    | <ul style="list-style-type: none"> <li>• <b>6</b> Key Findings &amp; Observations Identified</li> </ul> | <ul style="list-style-type: none"> <li>• <b>5</b> Improvement Opportunities Identified</li> </ul> |
|  <p><b>Digital</b><br/>Describes the Digital and Technology systems that support the delivery / interaction of Services</p> | <ul style="list-style-type: none"> <li>• <b>7</b> Key Findings &amp; Observations Identified</li> </ul> | <ul style="list-style-type: none"> <li>• <b>9</b> Improvement Opportunities Identified</li> </ul> |

## EXECUTIVE SUMMARY

With the goal of creating sustainable customer / citizen service change, CSPN has **prioritized the following recommendations alongside the 20 additional initiatives** that will improve the underlying service design.

### Overview of Prioritized Recommendations

#### Vision & Strategy



- V1 • **Clarify CX Vision** by creating a clear, compelling, and instructive "Vision Statement" that will guide all departments in how they design, develop, and deliver services.

#### Talent



- T1 • **Provide Customer Service & Service-Design Training** to equip Town employees with soft-skills that enable better communication, problem solving, and conflict management capabilities. Incorporate general "Service-Design" training at the management level to promote customer focus in decision making.

#### Process



- P4 • **Build an Organizational "Triage" Support Tool** outlining the organizational structure with detailed job summaries that employees can leverage to effectively triage customer inquiries to the most appropriate department / employees the first time.

#### Digital



- D1 • **Launch Customer Relationship Management (CRM) Software** to serve as the central repository for customer information, interactions and enable cross-departmental view / edit access.
- D2 • **Launch Workflow Automation (WFM) Software** to enable systems and cross-departmental workflows to be connected, driving service efficiencies by decreasing multiple manual touchpoints to log, track and complete tasks.

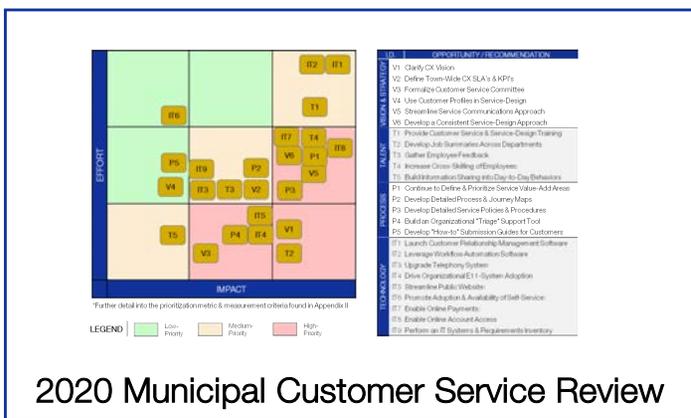
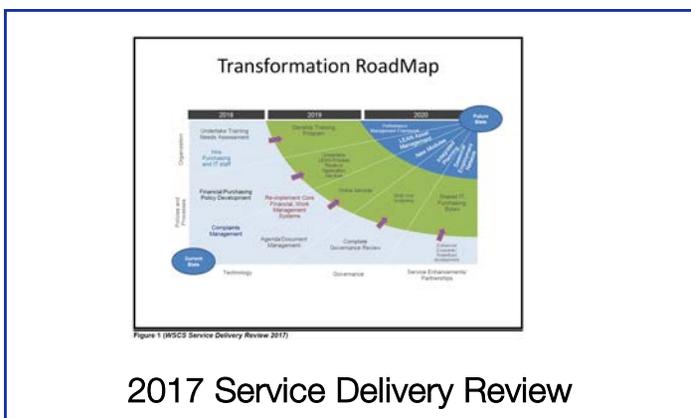


# EXECUTIVE SUMMARY

To support the Town of Midland with activating service improvement recommendations, **suggested next-step activities can be used as a guide for team members to follow moving forward.** CSPN's Improvement Recommendation Heatmap incorporates those initiatives identified within the 2017 Service Delivery Review as well as this reports updated 2020 Municipal Customer Service Review in order to streamline implementation.

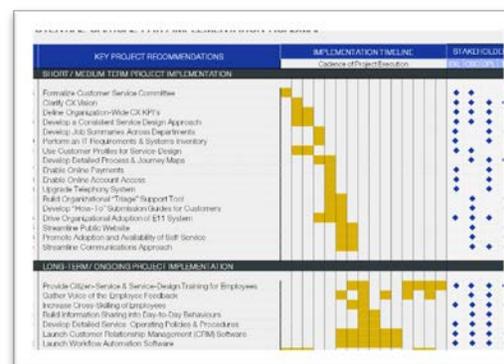
## Key Next-Step Activities Moving Forward:

### 1) Review Aligned Service Improvement Initiatives



|                                   | KEY ROLES   | KEY RESPONSIBILITIES   |
|-----------------------------------|---|--|
| <b>EXECUTIVE LEADERS</b>          | Includes CAO & Council Members  | <ul style="list-style-type: none"> <li>Overall Ownership &amp; Accountability for Implementation and Ongoing Success of Recommendation Projects</li> <li>Provide guidance in the strategic planning, design and assignment improvement recommendations</li> <li>Confirm final approvals for completion of implementation</li> </ul>      |
| <b>CUSTOMER SERVICE COMMITTEE</b> | Includes all Members within the Committee                                 | <ul style="list-style-type: none"> <li>Program Management for the "Oversight" list of Improvement Recommendation Initiatives being implemented</li> <li>Provide support and subject matter expertise to Leaders and Team Members through implementation</li> <li>Document and communicate project updates to the organization</li> </ul> |
| <b>DEPARTMENT LEADERS</b>         | Includes all Executive Directors of Departments                           | <ul style="list-style-type: none"> <li>Strategic Advisory &amp; Oversight for the Resources Required to Implement Assigned Recommendation Projects</li> <li>Organize departmental resources to implement recommendations</li> <li>Manage day-to-day execution of activities for assigned recommendation projects</li> </ul>              |
| <b>TEAM MEMBERS</b>               | Includes Manager to Frontline Employees not involved in the status review | <ul style="list-style-type: none"> <li>Drive, Collaborate and Support the activities required to Implement Recommendation Projects Appropriately to Role</li> <li>Coordinate with Department Leaders and Team Members to execute implementation activities</li> <li>Collaborate across the organization</li> </ul>                       |

2) Define Implementation "Teams" & Share / Communicate Planning with Impacted Stakeholders





## EXECUTIVE SUMMARY

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The global community is navigating unprecedented times during COVID-19 Pandemic. Due to the significant influence on all aspects of personal and professional life, considerations have been made for 1) how the project was delivered and 2) how the recommendations were identified.

### COVID-19 Pandemic: Key Implications & Considerations

- CSPN completed our review from July 2020 to October 2020 during the COVID-19 pandemic
- During the review, some of the Town's operations were run with reduced hours or via remote service delivery
- CSPN was able to connect with Town staff via a combination of socially distanced in-person interviews as well as through telephone and video conferencing
- While the Town and its citizens are clearly navigating a new normal of service delivery and service expectations, CSPN's findings and recommendations are made with a long-term (e.g., during and post-pandemic) service perspective
- CSPN recognizes that the Town will need to take short and mid-term actions to best-serve citizens and stakeholders in the safest manner possible, while adhering to advice from public health officials



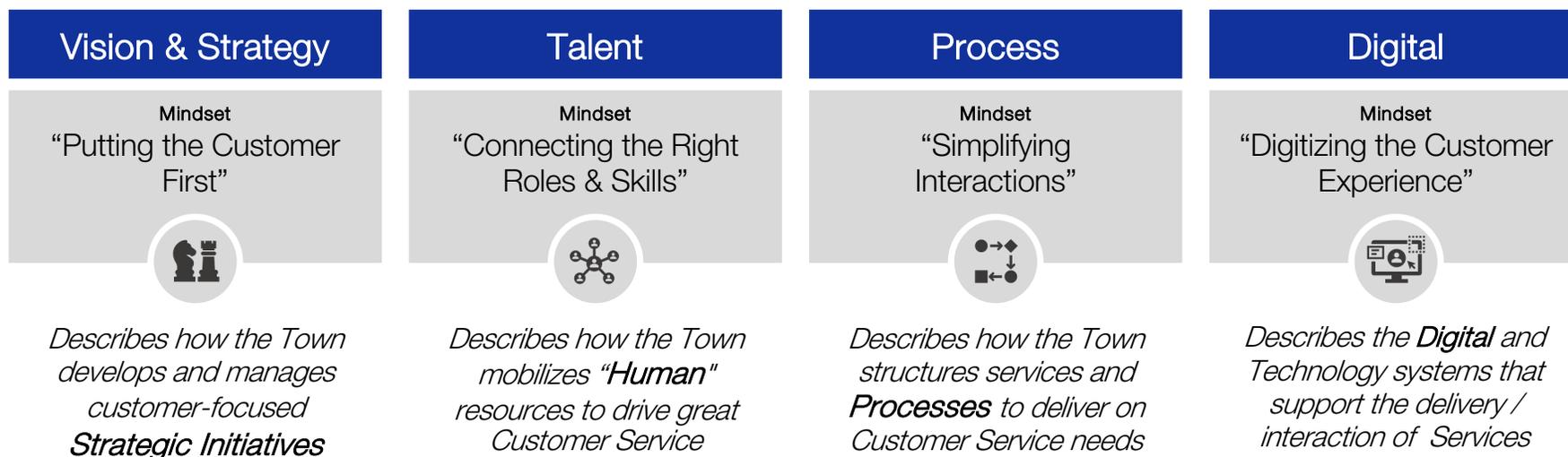


# Findings & Recommendations Summary

## STRATEGIC REVIEW CATEGORIES

To help guide the 2020 Municipal Customer Service Review, CSPN identified **four Strategic Categories** for analysis and **recommendations** that include: 1) Vision & Strategy, 2) Talent, 3) Process, and 4) Digital.

### Strategic Categories



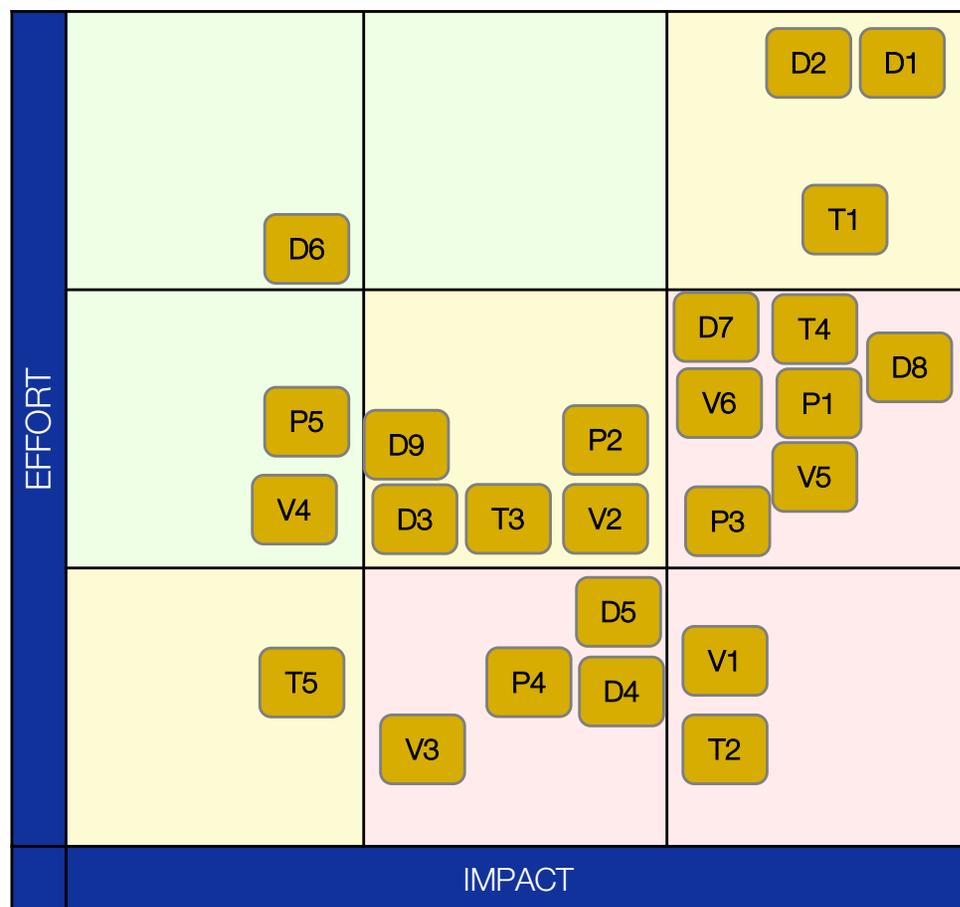
### High-Level Findings & Observations

- |   |  |   |  |
|---|--|---|--|
| <ul style="list-style-type: none"> <li>✓ Consistent Team Commitment to Deliver Great Service</li> <li>✗ Inconsistent Service Vision &amp; Strategy</li> <li>✗ Undefined CX-Driven Performance Goals &amp; Metrics Tracking</li> </ul> | <ul style="list-style-type: none"> <li>✓ Effective Customer-Relationship Building</li> <li>✗ Inconsistent Understanding of Roles &amp; Responsibilities</li> <li>✗ Single Failure Point in Service-Delivery</li> </ul> | <ul style="list-style-type: none"> <li>✓ Proactive Solving of Process Problems</li> <li>✗ Undefined Service-Processes &amp; Journeys</li> <li>✗ Multi-Touchpoint &amp; Manually-Driven Processes</li> </ul> | <ul style="list-style-type: none"> <li>✓ Multiple Digital Service Channels Available</li> <li>✗ Non-integrated IT Systems / Programs</li> <li>✗ Minimal Service-Driven Functionality in IT Infrastructure</li> </ul> |
|---|--|---|--|



# IMPROVEMENT RECOMMENDATION HEAT-MAP

Analyzing Strategic Categories uncovered improvement opportunities for the Towns service landscape. Targeting areas that maximize the positive impact on both Customer Experience & Business Performance requires relative scoring / ranking. The following table outlines the prioritization of all uncovered recommendations.



|                   | I.D. | OPPORTUNITY / RECOMMENDATION                            |
|-------------------|------|---|
| VISION & STRATEGY | V1   | Clarify CX Vision                                       |
|                   | V2   | Define Town-Wide CX SLA's & KPI's                       |
|                   | V3   | Formalize Customer Service Committee                    |
|                   | V4   | Use Customer Profiles in Service-Design                 |
|                   | V5   | Streamline Service Communications Approach              |
|                   | V6   | Develop a Consistent Service-Design Approach            |
| TALENT            | T1   | Provide Customer Service & Service-Design Training      |
|                   | T2   | Develop Job Summaries Across Departments                |
|                   | T3   | Gather Employee Feedback                                |
|                   | T4   | Increase Cross-Skilling of Employees                    |
|                   | T5   | Build Information Sharing into Day-to-Day Behaviors     |
| PROCESS           | P1   | Continue to Define & Prioritize Service Value-Add Areas |
|                   | P2   | Develop Detailed Process & Journey Maps                 |
|                   | P3   | Develop Detailed Service Policies & Procedures          |
|                   | P4   | Build an Organizational "Triage" Support Tool           |
|                   | P5   | Develop "How-to" Submission Guides for Customers        |
| DIGITAL           | D1   | Launch Customer Relationship Management Software        |
|                   | D2   | Leverage Workflow Automation Software                   |
|                   | D3   | Upgrade Telephony System                                |
|                   | D4   | Drive Organizational E11-System Adoption                |
|                   | D5   | Streamline Public Website                               |
|                   | D6   | Promote Adoption & Availability of Self-Service         |
|                   | D7   | Enable Online Payments                                  |
|                   | D8   | Enable Online Account Access                            |
|                   | D9   | Perform an IT Systems & Requirements Inventory          |

\*Further detail into the prioritization metric & measurement criteria found in Appendix II

| LEGEND | Low-Priority | Medium-Priority | High-Priority |
|--------|--------------|-----------------|---------------|
|        |              |                 |               |



## PRIORITIZED RECOMMENDATIONS

With the goal of creating sustainable customer / citizen service change, CSPN has prioritized the following recommendations **with significant impact on the Customer Service Experience** that will improve the underlying service design. The recommendations have been selected to support Midlands planning to drive meaningful change.

| ID  | Observed Challenges   | Recommendation Details  |
|---|---|---|
| V1<br>   | <ul style="list-style-type: none"> <li>Inconsistent Service Vision</li> <li>Inconsistent Service-Design Across Departments</li> </ul>                                 | <ul style="list-style-type: none"> <li><b>V1: Clarify CX Vision</b> by creating a clear, compelling, and instructive "Vision Statement" that will guide all departments in how they design, develop, and deliver services.</li> </ul>   |
| T1<br>   | <ul style="list-style-type: none"> <li>Inconsistent Service Skills &amp; Knowledge Across Departments</li> <li>Need for Employee Cross-Skilling</li> </ul>            | <ul style="list-style-type: none"> <li><b>T1: Provide Customer-Service &amp; Service-Design Training</b> to equip Town employees with soft-skills that enable better communication, problem solving, and conflict management capabilities. Incorporate general "Service-Design" training at the management level to promote customer focus in decision making.</li> </ul> |
| P4<br>   | <ul style="list-style-type: none"> <li>Inconsistent Needs Triaging</li> <li>Undefined Service-Processes &amp; Journeys</li> <li>Multi-Touchpoint Processes</li> </ul> | <ul style="list-style-type: none"> <li><b>P4: Build an Organizational "Triage" Support Tool</b> that outlines the Town's organizational structure with job summaries and critical customer-facing workflows to effectively triage inquiries to the most appropriate employees.</li> </ul>   |
| D1<br> | <ul style="list-style-type: none"> <li>Lack of Integration between IT Systems</li> <li>Minimal CX / CS Data Tracking &amp; Management</li> </ul>                      | <ul style="list-style-type: none"> <li><b>D1: Launch Customer Relationship Management (CRM) Software</b> to serve as the central repository for customer information and interactions and enable cross-departmental view / edit access.</li> </ul>  |
| D2<br> | <ul style="list-style-type: none"> <li>Lack of Integration between IT Systems</li> <li>Inconsistent Utilization of IT Systems</li> </ul>                              | <ul style="list-style-type: none"> <li><b>D2: Launch Workflow Automation (WFM) Software</b> to enable systems and cross-departmental workflows to be connected, driving service efficiencies by decreasing multiple manual touchpoints to log, track and complete tasks.</li> </ul>   |



# The Midland Service-Landscape

## THE MIDLAND SERVICE-LANDSCAPE OVERVIEW

Midland's Service Landscape can be simplified into the service **inputs** and the service **outputs**.

### INPUTS: Service-Delivery Elements

An organization's **service-delivery elements** indicate **HOW** services are executed and delivered to customers.



#### Vision & Strategy

Describes how the Town develops and manages customer-focused Strategic Initiatives



#### Talent

Describes how the Town mobilizes "Human" resources to drive great Customer Service



#### Process

Describes how the Town structures services and Process to deliver on Customer Service needs



#### Digital

Describes the Digital and Technology systems that support the delivery / interaction of Services

### OUTPUTS: Service-Interaction Needs

An organization's **service-interaction needs** indicate **WHY** services are required by customers in order to accomplish a need / job.

#### Get General Information / Support

- Town Updates, Service Status, Inquiries, Troubleshooting, Historical Documents / Statements

#### Apply / Get Approved for Something

- Building / By-Law Permits, Zoning Approvals, Licences, Tags, Certificates

#### Buy / Make a Payment for Something

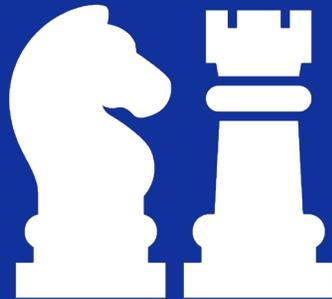
- Rentals, Invoice, Tickets / Fines, Property Taxes / Bills, Passes

#### Renew / Get Something Maintained

- Roads, Sidewalks, Snow Removal / Grass Cutting, Streetlights, Construction / Public Areas Cleaned

#### Use / Interact with a Service

- NSSRC Facilities, Harbour, Trails, Events, Outdoor Spaces, Events



## VISION & STRATEGY

This Strategic Category describes how the Town develops and manages customer-focused ***Strategic Initiatives*** with the desire to focus on...

*Putting the Customer First*

## VISION & STRATEGY: KEY FINDINGS & OBSERVATIONS

### Summary



Based on interviews it was clear that Town of Midland employee's desire to provide a great customer experience for citizens and stakeholders; however, there are inconsistent service visions, expectations, and approaches to delivering services which leads to varying levels of service quality.

| # | Findings & Observations  |
|---|--|
| 1 | <b>Consistent Team Commitment to Deliver Great Service:</b> Town leadership and employees articulate a desire to provide differentiated, and continuously improved service to Customers.   |
| 2 | <b>Inconsistent Service Vision &amp; Strategy:</b> The Town lacks a central framework that guides service-design and service-delivery goals across departments and service lines. The current focus is on internal departments as oppose to external customer needs. |
| 3 | <b>Division of Strategic Focus:</b> There is a divide amongst employee mindsets between wanting to change / innovate for the future and continuing to do what has always been done in the past.  |
| 4 | <b>Inconsistent Service-Design Across Departments:</b> As customers interact with the Town, they are required to do so in different ways depending on department and / or service. The process, channels and ability to complete tasks vary across services.         |
| 5 | <b>Undefined Customer Groups:</b> Trending demographics of the overall customer-base are known but the unique needs, expectations and value-drivers defining the similarities and differences amongst customer profile / groups characteristics are not.             |
| 6 | <b>Undefined CX-Driven Performance Goals &amp; Metrics Tracking:</b> A clearly defined service performance measurement framework with consistent and standardized organizational / departmental framework, metrics and scoring criteria does not currently exist.    |
| 7 | <b>Challenges with Progressing CX Initiatives:</b> Numerous ongoing improvement projects have been progressing at various levels of effectiveness and buy-in from stakeholders. Managing shifting priorities has caused projects to be delayed / put on hold.        |

\*Operational Definitions & Descriptions of Content Categories can be Found in Appendix II

## VISION & STRATEGY: SERVICE-IMPROVEMENT RECOMMENDATIONS

### Summary



The definition, formalization and documentation of strategic Customer Experience & Service elements are of primary focus to support the Town of Midlands drive towards customer-centricity. Leveraging CX best-practices to design the organizational approach to serving customers will lay the foundation in which further improvement opportunities can be built.

| #      | Key Opportunities & Recommendations  | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|--|--|---------------------------------|
| V<br>1 | <b>Clarify CX Vision:</b> Create a clear, compelling, and instructive Customer Experience "Vision Statement" that will guide all departments in how they design, develop, and deliver services. This statement should be communicated to all Town process owners and used to help guide large and small process enhancements.  | <ul style="list-style-type: none"> <li>• Opp. #39</li> <li>• Opp. #40</li> </ul>                     | > \$10,000                      |
|        |  |  | > 3 Months                      |
|        |  |  | Improve Service-Experience      |
| V<br>2 | <b>Define Town-Wide CX SLA's &amp; KPI's:</b> Identify clear service-levels and key performance indicators that can be used in all departments that measure customer sentiment – focusing both on the service-interaction and service-satisfaction level.  | <ul style="list-style-type: none"> <li>• Opp. #41</li> <li>• Opp. #42</li> <li>• Opp. #64</li> </ul> | \$10,000 - \$100,000            |
|        |  |  | > 3 Months                      |
|        |  |  | Decrease Complexity / Confusion |
| V<br>3 | <b>Formalize Customer Service Committee:</b> Clarify the mandate of the Customer Service Committee to serve as a central authority that will prioritize and monitor customer-facing enhancements. The CS Committee should be responsible to measure customer satisfaction by department. Where possible, the CS committee should support and / or manage key service enhancement projects as the Centre of Excellence. | <ul style="list-style-type: none"> <li>• Opp. #37</li> <li>• Opp. #49</li> <li>• Opp. #59</li> </ul> | > \$10,000                      |
|        |  |  | > 3 Months                      |
|        |  |  | Decrease Complexity / Confusion |

\*Operational Definitions & Descriptions of Content Categories can be Found in Appendix II



## VISION & STRATEGY: SERVICE-IMPROVEMENT RECOMMENDATIONS

| #      | Key Opportunities & Recommendations  | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|--|--|---------------------------------|
| V<br>4 | <b>Use Customer Profiles in Service-Design:</b> Develop Customer Profiles for distinct stakeholder groups that will help Town employees responsible for service design (or re-design) to adapt new and existing processes with an understanding of varying service needs / expectations. The Town can leverage Customer Profiles as communication, training, and planning tools to drive alignment and understanding across departments.   | <ul style="list-style-type: none"> <li>• Opp. #09</li> <li>• Opp. #43</li> <li>• Opp. #46</li> </ul> | \$10,000 - \$100,000            |
|        |  |  | 3 - 12 months                   |
|        |  |  | Improve Service-Experience      |
| V<br>5 | <b>Streamline Service Communications Approach:</b> Identify and prioritize the various communications being sent and build a calendarized structure to standardize the sharing of key information / updates to both internal and external stakeholders. Utilize the structured calendar to reduce the amount of informational "noise" to employee and customer groups while ensuring critical messages are delivered and digested.   | <ul style="list-style-type: none"> <li>• Opp. #6</li> </ul>  | > \$10,000                      |
|        |  |  | 3 - 12 months                   |
|        |  |  | Decrease Complexity / Confusion |
| V<br>6 | <b>Develop a Consistent Service-Design Approach:</b> Create an internal support tool to guide the planning of designing new / improved services. Build a document and process that can be used by all committees, managers and process owners to focus service design decisions on the customer impacts, needs and value-drivers as oppose to departments. (e.g. Customer Needs: Get Info. / Support., Apply / Get Approved, Buy / Make a Payment, Maintain / Renew, Use / Interact) | <ul style="list-style-type: none"> <li>• Opp. #14</li> <li>• Opp. #44</li> <li>• Opp. #62</li> </ul> | \$10,000 - \$100,000            |
|        |  |  | 3 - 12 months                   |
|        |  |  | Improve Service-Experience      |



TALENT

This Strategic Category describes how the Town mobilizes *“Human”* resources to drive great Customer Service with the desire to focus on...

*Connecting the Right Roles & Skills*



## TALENT: KEY FINDINGS & OBSERVATIONS

### Summary



Midland employees share a strong commitment to customer service and are integrated members of the community; however, capacity limitations cause employees to have an inconsistent understanding of internal structure and processes as well as use of support tools to deliver services at the same level of effectiveness.

| #  | Findings & Observations   |
|----|---|
| 8  | <b>Engaged Community Members:</b> Pre-pandemic, Midland customers have been involved and engaged in services, events and general offerings provided by the Town.  |
| 9  | <b>Effective Customer-Relationship Building:</b> At times, Town of Midland employees are excellent at getting to know their customers and building strong long-term relationships with stakeholders (friendly, professional demeanor).  |
| 10 | <b>Inconsistent Service Skill &amp; Knowledge Levels:</b> Capabilities are not consistent across employees, impacting how internal processes and systems are utilized as well as how external customers are handled – the underlying effect is an inconsistent service-experience delivered to customers.   |
| 11 | <b>Poor Definition &amp; Understanding of Service Policies / Procedures:</b> Employees and Customers have varying levels of clarity for expectations of how services are delivered, the steps required to complete and the timelines for communications or closing out of service-needs.  |
| 12 | <b>Inconsistent Understanding of Roles &amp; Responsibilities:</b> Employee and Customer understanding into the division of what services are offered and what departments / employee roles are responsible for is not well known, causing significant confusion. There is a lack of definition as well as transparency for the ownership / accountability of services. |



## TALENT: KEY FINDINGS & OBSERVATIONS

| #  | Findings & Observations   |
|----|---|
| 13 | <b>High Employee Turnover:</b> There is continual turnover of Leadership-to-Frontline employees across departments causing negative impacts such as confusion, unknown change in priorities, loss of organizational knowledge and stress on staff to accommodate for decreased personnel. As a positive, new team members can be an extremely beneficial addition through the introduction of new ideas, ways of thinking and innovative initiatives. |
| 14 | <b>Single Failure Point in Service-Delivery:</b> For some key services / activities, the concentration of understanding, knowledge, skills and / or systems access on an individual employee can cause significant bottlenecks and delays in completing the service. Reliance on a single / small number of employees can halt service-delivery without the ability to react effectively to resolve issues.   |
| 15 | <b>Need for Employee Cross-Skilling:</b> There is minimal cross-skilling for employees to be flexible in completing various services / activities and cover different roles or complete a specific task when needed. Capacity levels make "covering" roles with existing resources a challenge as it takes away from the resource's primary role.   |

## TALENT: SERVICE-IMPROVEMENT RECOMMENDATIONS

### Summary



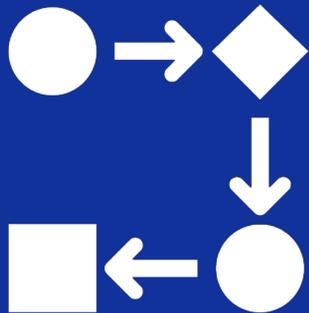
Empowering employees with a consistent level of service-driven understanding, knowledge and skills is of primary focus to support the Town of Midlands team members in delivering great Customer Experiences at every touchpoint. Cultivating an agile workforce with the tools to take control of their responsibilities will enable efficient change alongside organizational needs.

| #      | Key Opportunities & Recommendations  | Previous Projects  | Impacts<br>(Cost / Time / Benefit) |
|--------|--|--|------------------------------------|
| T<br>1 | <b>Provide Customer Service &amp; Service Design Training:</b> Equip Town employees with Customer Service soft-skills that enable better communication, problem solving, and conflict management capabilities. Incorporate general "Service-Design" training at the management level to promote the customer focus in decision making. Specialized training will ensure that Town employees understand and provide a consistent customer experience across departments.  | <ul style="list-style-type: none"> <li>• Opp. #34</li> <li>• Opp. #36</li> <li>• Opp. #38</li> <li>• Opp. #55</li> </ul> | \$10,000 - \$100,000               |
|        |  |  | 12 months +                        |
|        |  |  | Improve Service-Experience         |
| T<br>2 | <b>Develop Job-Summaries Across Departments:</b> Develop a top-down "Roles & Responsibilities" map that will help guide all internal employees to better understand which department and employee group is responsible for what tasks. A clear map will make it easier for employees to identify who customers should be forwarded to next and avoid requiring multiple employees handling the same issue. These roles & responsibilities maps should be combined with the recommended Organizational "Triage" Support Tool (P4) so that Town employees have familiarity with the full-cycle of customer issues. | <ul style="list-style-type: none"> <li>• Opp. #61</li> <li>• Opp. #65</li> </ul>   | > \$10,000                         |
|        |  |  | > 3 months                         |
|        |  |  | Decrease Complexity / Confusion    |



## TALENT: SERVICE-IMPROVEMENT RECOMMENDATIONS

| #      | Key Opportunities & Recommendations   | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|---|--|---------------------------------|
| T<br>3 | <b>Gather Employee Feedback:</b> Build a simple, recurring employee survey to obtain internal feedback and identify critical positive and negative elements on an ongoing basis. Incorporate an internal and external feedback component to uncover employee sentiment as well as their perspective on customer sentiment from direct interactions. Integrate survey initiative into CS Committee Roles & Responsibilities to track and manage  | <ul style="list-style-type: none"> <li>• Opp. #63</li> </ul> | \$10,000 - \$100,000            |
|        |   |  | 3 - 12 months                   |
|        |   |  | Decrease Time / Effort          |
| T<br>4 | <b>Increase Cross-Skilling of Employees:</b> Build cross-role knowledge and skills of employees in order to increase flexibility and agility of resources ability to deliver services. Prioritize key departmental roles with high impact, volume and / or specialized skills in order to target cross-skilling needs that drive organizational efficiency (e.g. collecting and processing payments at various locations). Build cross-skill strategy into formal Service Training Program. | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>  | \$10,000 - \$100,000            |
|        |   |  | 3 - 12 months                   |
|        |   |  | Improve Service-Experience      |
| T<br>5 | <b>Build Information Sharing into Day-to-Day Behaviours:</b> Integrate "Update Summaries" to be documented weekly by department heads outlining any key changes or upcoming plans. Share throughout the organization in stand-up morning meetings within all teams to discuss key information.  | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>  | > \$10,000                      |
|        |   |  | > 3 months                      |
|        |   |  | Decrease Complexity / Confusion |



PROCESS

*This Strategic Category describes how the Town structures services and **Processes** to deliver on Customer Service needs with the desire to focus on...*

*Simplifying Interactions*



## PROCESS: KEY FINDINGS & OBSERVATIONS

### Summary



Service operations are built with multiple interaction options for customers; however the lack of formal definition and automation for service policies, procedures and processes causes confusion in employees / customers while putting increased strain on the effort to complete activities.

| #  | Findings & Observations  |
|----|--|
| 16 | <b>Multi-Channel Service Interaction Options:</b> The Town Is equipped to deliver foundational service interactions across various channels. Having options is known to be a desire / expectation from customer groups (e.g. in-person, phone, mail, online)   |
| 17 | <b>Inconsistent Needs Triaging:</b> There is customer confusion between which services are delivered by the Town of Midland and which are delivered by the County. For Midland specific services, the confusion continues with customers unsure of which department / employee to connect with for their service needs causing a connection to the wrong area, then being transferred.   |
| 18 | <b>Undefined Service-Processes &amp; Journeys:</b> Internal processes clearly outlining the key steps, activities, tasks and requirements to deliver services are either not defined, documented, and / or known consistently across the organization. Employees are therefore executing tasks and services differently which causes confusion when trying to collaborate with other team members. Customers also feel the impact as their expectations continue to change from the inconsistency. |



## PROCESS: KEY FINDINGS & OBSERVATIONS

| #  | Findings & Observations   |
|----|---|
| 19 | <b>Multi-Touchpoint &amp; Manually-Driven Processes:</b> Many key service activities require numerous employees / departments to be involved (which are not always mandatory, being able to be completed by a single employee). Many activities are currently completed manually causing a significant pressure on time / effort with workflows not being centrally tracked in an automated format. The increased effort is also felt by customers who are required to complete similar manually intensive processes. |
| 20 | <b>Inconsistent Follow-Up &amp; Information Sharing:</b> There is currently not an organizational known and followed communications strategy that guides a structured internal and external communication approach. There is a lack of transparency across departments for 1) general understanding of changes / updates and 2) service specific status / progress. This is also experienced by customers who can't easily find existing information they want so are forced to connect with Midland directly.        |
| 21 | <b>Proactive Solving of Process Problems:</b> Despite the complicated internal processes there are numerous examples of employees going out of their way to find creative "workarounds" to deliver services effectively, but the solutions are not always shared organization-wide.   |



## PROCESS: SERVICE-IMPROVEMENT RECOMMENDATIONS

### Summary



The definition, formalization and documentation of service-oriented processes and journeys is of primary focus to support the Town of Midland in aligning operations towards effective service-delivery. Having clear and simple expectations removes confusion while ensuring human-talent, Digital and actions are moving in the same direction.

| #      | Key Opportunities & Recommendations  | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|--|--|---------------------------------|
| P<br>1 | <p><b>Continue to Define &amp; Prioritize Service Value-Add Areas:</b> Leverage the 2020 Customer Service Review Findings &amp; Recommendations as well as the current Shared-Service Review to build upon existing improvement opportunity projects underway. Utilize new insights to reorganize the ranking of the removal / outsourcing of services with significant resource requirements and / or provide minimal value to customers (leveraging 3<sup>rd</sup> party vendors).</p> <p>Inventory existing resources to identify underutilized areas within the current infrastructure that could be repurposed to meet customer needs. (i.e. renting unused NSSRC space during off-season / low-use periods).</p> | <ul style="list-style-type: none"> <li>Opp. #11, 22, 45, 47, 48, 52, 53, 66, 67, 68</li> </ul> | \$10,000 - \$100,000            |
|        |  |  | 12 months +                     |
|        |  |  | Improve Financial Performance   |
| P<br>2 | <p><b>Develop Detailed Process &amp; Journey Maps:</b> Identify services with common, critical, and complex processes that have significant impact on customer needs and / or employee effort and develop detailed internal process and customer journey maps that help make it easier to deliver services both individually and across departments..</p> <p>e.g. Target Service Processes: accepting payments, answering general CS inquiries, completing a maintenance request</p> <p>Identify the critical impact touchpoints across processes / journeys in order to integrate refined policies / procedures to ensure the moments that matter most to customers are handled effectively.</p>                      | <ul style="list-style-type: none"> <li>Opp. #2, 4, 10, 16, 20, 17, 30, 35, 54</li> </ul>       | \$10,000 - \$100,000            |
|        |  |  | 3 - 12 months                   |
|        |  |  | Decrease Time / Effort          |



## PROCESS: SERVICE-IMPROVEMENT RECOMMENDATIONS

| #      | Key Opportunities & Recommendations  | Previous Projects  | Impacts (Cost / Time / Benefit)                                       |
|--------|--|--|---|
| P<br>3 | <b>Develop Detailed Service Policies &amp; Procedures:</b> Identify the most common and critical activities causing confusion across employee / customers and define clear procedures to guide the activities and behaviours to complete tasks effectively and at a high level of standardization.   | <ul style="list-style-type: none"> <li>• Opp. #32</li> <li>• Opp. #18</li> </ul> | \$10,000 - \$100,000<br>> 3 months<br>Decrease Complexity / Confusion |
| P<br>4 | <b>Build an Organizational "Triage" Support Tool:</b> Develop a comprehensive document outlining the organizational structure with detailed job summaries that employees can leverage to effectively triage customer inquiries to the most appropriate department / employees the first time.  | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>                      | > \$10,000<br>3 - 12 months<br>Decrease Time / Effort                 |
| P<br>5 | <b>Develop "How-to" Submission Guides for Customers:</b> Make it easy for customers to submit permits, applications, and general issues / inquiries, etc. by creating clear instructional guides. The guides should be a step-by-step tool outlining the tasks needed to complete the action and helpful answers to frequently-asked-questions as well as show "correct" examples, be easily accessible and found on the Town's website. | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>                      | > \$10,000<br>> 3 months<br>Decrease Time / Effort                    |



DIGITAL

This Strategic Category describes the **Digital** and Technology systems that support the delivery / interaction of Services with the desire to focus on...

*Digitizing the Customer Experience*

## DIGITAL: KEY FINDINGS & OBSERVATIONS

### Summary



The IT infrastructure at Midland is a known and prioritized opportunity area with initiatives underway to improve; however the current lack of functionality and integration of internal / customer-facing digital tools does not effectively empower stakeholders with transparent and self-managed services.

| #  | Findings & Observations  |
|----|--|
| 22 | <b>Multiple Digital Service Channels Available:</b> Customers have the ability to interact with services through different digital channels (i.e. Website, E-Service, Social Media, E-Mail, Online Banking). However, the general functionality of channels does not meet level that is expected by many customers.  |
| 23 | <b>Challenges with Planning &amp; Executing IT Improvements:</b> Numerous ongoing IT related projects at both the organizational and individual department level have made the identification and definition of clear “Requirements” for functionality needs difficult. This lack of definition is causing systems and programs to be purchased independently without considering the compatibility / integration capability into existing platforms. There is currently no consistently known and followed overarching framework to support the design and acquisition of a holistic suite of programs. |
| 24 | <b>Non-Integrated IT Systems / Programs:</b> Current suit of IT programs and systems is not effectively integrated allowing for end-to-end completion of service activities or the capture of service-delivery data. Individual departments / services utilize various systems, causing the time-consuming manual “porting” of information to be done across systems by employees.   |
| 25 | <b>Inconsistent Utilization of IT Systems:</b> Expectations for employee utilization of IT systems is not defined causing confusion and inconsistency in how they are used across the organization. The E11 system is a key platform that is either not being used entirely or not being used effectively by many employees.   |



## DIGITAL: KEY FINDINGS & OBSERVATIONS

| #  | Findings & Observations   |
|----|---|
| 26 | <b>Ineffective Housing &amp; Accessing Information:</b> Internal housing of information and documents is not currently set-up effectively for employees to be empowered with needed service-related knowledge. There is a lot of organizational information that exists however, many employees are either unaware, do not know where to locate, or cannot do so fast enough while serving customers. |
| 27 | <b>Minimal Service-Driven Functionality in IT Infrastructure:</b> Current systems lack the capabilities for customers to self-service key interactions and complete tasks digitally (e.g. Key Functionality Gaps: payments, submissions, information gathering, changes).   |
| 28 | <b>Minimal CX / CS Data Tracking &amp; Management:</b> Systems are not effectively tracking and managing end-to-end service-related data at both the internal operations level as well as the external customer interaction level.  |

# DIGITAL: SERVICE-IMPROVEMENT RECOMMENDATIONS

## Summary



The functionality and integration of internal / external IT Systems is of primary focus to support the Town of Midlands transformation towards a modernized Customer Experience that stakeholders expect. Having an “up-to-date” infrastructure that can be built upon, systems that are used effectively / consistently, and a self-serve focus for customers will decrease effort while increasing efficiency.

| #      | Key Opportunities & Recommendations  | Previous Projects   | Impacts (Cost / Time / Benefit) |
|--------|--|---|---------------------------------|
| D<br>1 | <p><b>Launch Customer Relationship Management (CRM) Software:</b> A CRM will serve as the central repository for customer information and interactions and enable cross-departmental view / edit access. A CRM currently does not exist to centrally track citizen interaction insights which dramatically decreases employee ability to provide a consistent and personalized service.</p> <p>As an organization this gap also dramatically decreases the ability to identify customer issues and make informed decisions on how to improve moving forward. (e.g., Gaps in Data-Management: account management, billing, issue tracking)</p>  | <ul style="list-style-type: none"> <li>Net-New – remove dept.-use programs</li> </ul> | \$100,000 +                     |
|        |  |   | 12 months +                     |
|        |  |   | Decrease Complexity / Confusion |
| D<br>2 | <p><b>Launch Workflow Automation (WFM) Software:</b> Town employees require multiple touchpoints to log, track, and resolve complaints or complete multi-step processes. Leveraging a workflow automation software package will enable multiple existing software suites and cross-departmental workflows to be connected and streamlined, significantly increasing service-delivery efficiencies.</p> <p>Key WFM Functionality:</p> <ul style="list-style-type: none"> <li>Track customer touchpoints end-to-end across all interactions of the service lifecycle</li> <li>Capture status, updates and notes from employees (in real-time through the journey)</li> <li>House organizational knowledge &amp; information in a centralized, easy to access platform</li> </ul> | <ul style="list-style-type: none"> <li>Opp. #01, 07, 24, 25, 29, 33, 60</li> </ul>    | \$100,000 +                     |
|        |  |   | 12 months +                     |
|        |  |   | Decrease Time / Effort          |



## DIGITAL: SERVICE-IMPROVEMENT RECOMMENDATIONS

| #      | Key Opportunities & Recommendations   | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|---|--|---------------------------------|
| D<br>3 | <p><b>Upgrade Telephony System:</b> Replace the existing phone system to a flexible VOIP option with increased functionality - integrate planning into overall IT Systems &amp; Requirements Inventory to ensure compatibility.</p> <p>Key Features to Include: Provide key updates / messaging within IVR, update descriptions of IVR options to align with customer needs, allow individual employee extensions, movable soft-phones, smart call flows for external callers, data tracking, etc.</p>  | <ul style="list-style-type: none"> <li>• Opp. #08</li> </ul> | \$10,000 - \$100,000            |
|        |   |  | 3 - 12 months                   |
|        |   |  | Improve Service-Experience      |
| D<br>4 | <p><b>Drive Organizational E11-System Adoption:</b> Define specific requirements and expectations at the department / role level for the utilization of E11 when interacting with customers.</p> <p>Key Procedures to Include:</p> <ul style="list-style-type: none"> <li>• The frequency of "when" to input information at key touchpoints with customers</li> <li>• The amount and detail level of "what" information to input</li> <li>• Streamline the E11 category choices to align with key customer needs (similar to IVR)</li> </ul>  | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>  | > \$10,000                      |
|        |   |  | > 3 months                      |
|        |   |  | Improve Service-Experience      |
| D<br>5 | <p><b>Streamline Public Website:</b> Reorganize Official Town of Midland website webpage design, structure and content to be focused on customer needs and jobs they are looking to accomplish as oppose to internal departments. Break apart sections with page layers and content that are targeted towards customer profiles. (E.g. Unique section with all relevant information in one place for Business, and one for Tourists, etc.)</p> <p>Outside of Customer Profile sections, align the structure of the web design to the recommended CX-driven service design approach (e.g. make a payment, apply for a service, make a booking, get information, etc.).</p> | <ul style="list-style-type: none"> <li>• Net-New</li> </ul>  | > \$10,000                      |
|        |   |  | > 3 months                      |
|        |   |  | Decrease Complexity / Confusion |



## DIGITAL: SERVICE-IMPROVEMENT RECOMMENDATIONS

| #      | Key Opportunities & Recommendations   | Previous Projects  | Impacts (Cost / Time / Benefit) |
|--------|---|--|---------------------------------|
| D<br>6 | <p><b>Promote Adoption &amp; Availability of Self-Service:</b> Educate and allow easy-access for customers to self-manage their service interactions wherever possible (both for current system functionality and any future capabilities as they arise).</p> <p>E.g. Adoption Initiative: Provide "Kiosks" for computer / internet access at key high-traffic touchpoints where customer can complete tasks (at Town Hall, NSSRC, Harbour, etc.)</p> <p>Require appointment-based "booking" for complex in-person service needs / inquiries to encourage self-serve behaviours from customers.</p>   | <ul style="list-style-type: none"> <li>• Opp. #19</li> </ul>   | > \$10,000                      |
|        |   |  | > 3 months                      |
|        |   |  | Improve Service-Experience      |
| D<br>7 | <p><b>Enable Online Payments:</b> Where possible, leverage Great Plains Accounting platforms and additional platform upgrades to enable online payments for water billing, permits, and other fee-based activities.</p>   | <ul style="list-style-type: none"> <li>• Opp. #12</li> <li>• Opp. #15</li> </ul>   | \$10,000 - \$100,000            |
|        |   |  | 3 - 12 months                   |
|        |   |  | Decrease Time / Effort          |
| D<br>8 | <p><b>Enable Online Account Access:</b> Where possible, leverage the proposed CRM or Great Plains Accounting platforms to enable online user accounts (e.g., water billing account access, permit account access). Online account access will provide customers with transparency into their account status as well enable additional activities such as payment transactions, application completion / submission, account updates, and issue logging.</p>   | <ul style="list-style-type: none"> <li>• Opp. #21, 26, 31, 56, 57, 58</li> </ul>   | \$10,000 - \$100,000            |
|        |   |  | 3 - 12 months                   |
|        |   |  | Improve Service-Experience      |
| D<br>9 | <p><b>Perform an IT Systems &amp; Requirements Inventory:</b> Continue to build a comprehensive list of all systems as well as the functionality needs to drive service improvement goals.</p> <p>Identify all current systems in-use and what the current / available functionality is across all potential licenses with vendors.</p> <ul style="list-style-type: none"> <li>• Define organizational / departmental "business requirements" for an ideal future-state system that enables self-service, tracking, communication elements that align to the evolving customer experience / service goals</li> <li>• Require incorporation of IT department into all Technology related planning / purchases</li> </ul> | <ul style="list-style-type: none"> <li>• Opp. #23</li> <li>• Opp. #27</li> <li>• Opp. #28</li> <li>• Opp. #50</li> </ul> | > \$10,000                      |
|        |   |  | > 3 months                      |
|        |   |  | Improve Financial Performance   |



# Recommendation Impact on Costs & Revenue



## APPENDIX IV: RECOMMENDATIONS IMPACT ON COST & REVENUE DETAILS

| I.D.              | OPPORTUNITY / RECOMMENDATION | BENEFIT                                      | BENEFIT DRIVER | KEY BENEFIT       | RATIONALE DETAILS  |   |
|-------------------|------------------------------|--|----------------|-------------------|--|---|
| VISION & STRATEGY | V1                           | Clarify CX Vision                            | N / A          | N / A             | N / A  | Internal exercise designed to drive team and operational CX alignment with limited direct cost / revenue impact.  |
|                   | V2                           | Define Town-Wide CX SLA's & KPI's            | N / A          | N / A             | N / A  | Leveraging KPI's such as Net-Promoter-Score (NPS) in customer-facing roles is proven to directly correlate to increases in revenue. Services at marinas, parks, and community center's could be positively impacted, driving profitability. |
|                   | V3                           | Formalize Customer Service Committee         | N / A          | N / A             | N / A  | Internal exercise designed to drive CX Governance and project efficiency alignment with limited direct cost / revenue impact.   |
|                   | V4                           | Use Customer Profiles in Service-Design      | N / A          | N / A             | N / A  | Tactical internal planning workshops aligning true customer needs could identify new / additional value-add services, increasing revenues.  |
|                   | V5                           | Streamline Service Communications Approach   | > \$50,000     | Decrease Costs    | Reduce / Maintain FTE Levels Required to Complete Value-Add Service Activities | Streamlined communication will drive time-savings within internal teams and enable better resource allocation, decreasing additional hiring needs.  |
|                   | V6                           | Develop a Consistent Service-Design Approach | > \$50,000     | Increase Revenues | Align Services with Customer Values to Drive Purchase Decisions                | Streamlined approach, structure and processes will drive time-savings within internal teams and enable better resource allocation, decreasing the need to hire additional staff.  |



## APPENDIX IV: RECOMMENDATIONS IMPACT ON COST & REVENUE DETAILS

| I.D. | OPPORTUNITY / RECOMMENDATION                        | BENEFIT              | BENEFIT DRIVER | KEY BENEFIT   | RATIONALE DETAILS  |
|------|---|----------------------|----------------|---|--|
| T1   | Provide Customer Service & Service-Design Training  | \$50,000 - \$100,000 | Decrease Costs | Reduce / Maintain FTE Levels to Complete Required Cross-Functional Service Activities | High soft-skill and emotional intelligence levels are proven drivers of positive service interactions and in turn the desire to grow relationships with an organization which could increasing revenues. |
| T2   | Develop Job Summaries Across Departments            | \$50,000 - \$100,000 | Decrease Costs | Reduce / Maintain FTE Levels Required to Complete Value-Add Service Activities        | Streamlined operational tool will drive time-savings within internal teams and enable better resource allocation, decreasing the need to hire additional staff.  |
| T3   | Gather Employee Feedback                            | \$100,000 +          | Decrease Costs | Reduce Turnover, Recruitment, Hiring & Onboarding Activities                          | Tactical feedback from employees will identify small changes that directly impact quarterly and annual budgets (e.g., enabling e-billing for water will reduce postage).                                 |
| T4   | Increase Cross-Skilling of Employees                | \$100,000 +          | Decrease Costs | Reduce / Maintain FTE Levels to Complete Required Cross-Functional Service Activities | Enabling better back-up & cross-skill training will reduce time-off errors and maintain coverage on revenue-generating services as well as decrease the need to hire additional staff.                   |
| T5   | Build Information Sharing into Day-to-Day Behaviors | N / A                | N / A          | N / A   | N/A  |

TALENT



## APPENDIX IV: RECOMMENDATIONS IMPACT ON COST & REVENUE DETAILS

| I.D. | OPPORTUNITY / RECOMMENDATION                            | BENEFIT             | BENEFIT DRIVER    | KEY BENEFIT   | RATIONALE DETAILS  |
|------|---|---------------------|-------------------|---|--|
| P1   | Continue to Define & Prioritize Service Value-Add Areas | N / A               | N / A             | N / A   | Internal exercise designed to drive team and operational alignment with limited direct cost / revenue impact.                                    |
| P2   | Develop Detailed Process & Journey Maps                 | \$1,000 - \$100,000 | Decrease Costs    | Reduce / Maintain FTE Levels Required to Complete Value-Add Service Activities          | Internal exercise designed to drive team and operational alignment and understanding of problem areas with limited direct cost / revenue impact. |
| P3   | Develop Detailed Service Policies & Procedures          | N / A               | N / A             | N / A   | Internal exercise designed to drive team and operational alignment with limited direct cost / revenue impact.                                    |
| P4   | Build an Organizational "Triage" Support Tool           | > \$50,000          | Increase Revenues | Minimize the Amount of Customer "Abandon Points" to Drive Towards Close-Out of Payments | Internal exercise designed to drive team and operational alignment with limited direct cost / revenue impact.                                    |
| P5   | Develop "How-to" Submission Guides for Customers        | > \$50,000          | Increase Revenues | Minimize the Amount of Customer "Abandon Points" to Drive Towards Close-Out of Payments | Reducing Customer Effort typically leads to increased usage of services (e.g., special event booking, permit application), increasing revenues.  |

PROCESS



## APPENDIX IV: RECOMMENDATIONS IMPACT ON COST & REVENUE DETAILS

| I.D.    | OPPORTUNITY / RECOMMENDATION | BENEFIT  | BENEFIT DRIVER       | KEY BENEFIT       | RATIONALE DETAILS   |  |
|---------|------------------------------|--|----------------------|-------------------|---|--|
| DIGITAL | D1                           | Launch Customer Relationship Management Software | N / A                | N / A             | N / A   | N/A  |
|         | D2                           | Leverage Workflow Automation Software            | \$50,000 - \$100,000 | Decrease Costs    | Minimize Non-Value-Add Services & Activities Underutilized by Customers                     | Many current single-desk or inter-departmental processes require manual processing or repetitive tasks that could be automated. Through automation, opportunity to redeploy staff to more productive tasks can maximize capacity, decreasing hiring needs. |
|         | D3                           | Upgrade Telephony System                         | > \$50,000           | Decrease Costs    | Reduce / Maintain FTE Levels Required to Complete Value-Add Services Activities             | Current system is outdated, not-functioning adequately and is expensive to maintain. Shifting to a VOIP system will enable better configurability and reduce maintenance costs.  |
|         | D4                           | Drive Organizational E11-System Adoption         | N / A                | N / A             | N / A   | N/A  |
|         | D5                           | Streamline Public Website                        | > \$50,000           | Increase Revenues | Minimize Customer Effort in Uncovering Service Needs to Drive Towards Close-Out of Payments | Reducing Customer Effort typically leads to increased usage of services (e.g., special event booking, permit application), increasing revenues.  |
|         | D6                           | Promote Adoption & Availability of Self-Service  | > \$50,000           | Increase Revenues | Minimize Customer Effort in Uncovering Service Needs to Drive Towards Close-Out of Payments | Providing access to all service-interaction channels typically leads to increased usage of services (e.g., special event booking, permit application), increasing revenues.  |



## APPENDIX IV: RECOMMENDATIONS IMPACT ON COST & REVENUE DETAILS

| I.D.    | OPPORTUNITY / RECOMMENDATION | BENEFIT  | BENEFIT DRIVER       | KEY BENEFIT       | RATIONALE DETAILS  |   |
|---------|------------------------------|--|----------------------|-------------------|--|---|
| DIGITAL | D7                           | Enable Online Payments                         | \$50,000 - \$100,000 | Increase Revenues | Minimize Customer Effort in Performing Service Transactions to Drive Towards Close-Out of Payments | Reducing Customer Effort and simplifying purchasing typically leads to increased usage of services (e.g., bill payment, tag / permit, parking / fines), increasing revenues.  |
|         | D8                           | Enable Online Account Access                   | \$50,000 - \$100,000 | Increase Revenues | Minimize Customer Effort in Performing Service Transactions to Drive Towards Close-Out of Payments | Streamlined IT Systems / Tools will drive time-savings within internal teams and enable better resource allocation, decreasing the need to hire additional staff. Enabling online access will reduce postage and manual payment processing costs. |
|         | D9                           | Perform an IT Systems & Requirements Inventory | \$100,000 +          | Decrease Costs    | Remove Unused / Non-Value Current Systems & Licenses   | Existing IT spend includes legacy software that has not been used properly or at all (non-value cost) and discontinuing can reduce capital expenditures.  |

**Total Benefit:** Min: \$12,000  
Max: \$1,700,000



# Action-Plan & Implementation



## ACTION-PLANNING & IMPLEMENTATION OVERVIEW

No matter the “quality” of the potential recommendation, **the success of any improvement initiative is extremely dependent on the effectiveness of its implementation** as well as ongoing adoption / buy-in from impacted stakeholders. The approach to maximizing the success of identified opportunities has two major components including, an **Action-Planning Governance Structure** and a **Critical-Path Implementation Roadmap**.

The following outline is meant to guide the Town of Midland as a support tool in driving forward the identified recommendations and ensuring the success of their integration into the organization.

### Action-Planning Governance Structure

The Governance Structure includes the stakeholder groups involved and their key roles & responsibilities within implementation recommendation projects.



### Critical Path Implementation Roadmap

The Implementation Roadmap incorporates interdependencies within recommendations and outlines the potential cadence to focus efforts on the implementation of initiatives.

| #  | KEY PROJECT RECOMMENDATIONS          | IMPLEMENTATION TIMELINE      | STAKEHOLDER          |
|--|--------------------------------------|------------------------------|----------------------|
|  |                                      | Cadence of Project Execution | EXL   CSO   DPL   TM |
| SHORT / MEDIUM-TERM PROJECT IMPLEMENTATION |                                      |                              |                      |
| G3   | Formalize Customer Service Committee | ■                            | ◆ ◆ ◆ ◆              |
| G1   | Clarify CX Vision                    | ■ ■                          | ◆ ◆ ◆ ◆              |
| G2   | Define Organization-Wide CX KPI's    | ■ ■ ■                        | ◆ ◆ ◆ ◆              |



# POTENTIAL ACTION-PLANNING GOVERNANCE STRUCTURE

|   |   | KEY ROLES   | KEY RESPONSIBILITIES  |
|---|---|---|---|
| <div style="background-color: #d9e1f2; border-radius: 15px; padding: 10px; width: 150px; margin: 0 auto;">EXECUTIVE LEADERS</div>                           | <i>Includes CAO &amp; Council Members</i>                                       | <ul style="list-style-type: none"> <li>Overall Ownership &amp; Accountability for Implementation and Ongoing Success of Recommendation Projects</li> </ul>        | <ul style="list-style-type: none"> <li>Provide guidance in the strategic planning, design and assignment of improvement recommendations</li> <li>Confirm final approvals for completion of implementation</li> </ul>    |
| <div style="background-color: #fff9c4; border-radius: 15px; padding: 10px; width: 150px; margin: 0 auto;">           CUSTOMER SERVICE COMMITTEE<br/> </div> | <i>Includes all Members within the Committee</i>                                | <ul style="list-style-type: none"> <li>Program Management for the “Overarching” Set of Improvement Recommendation Initiatives being Implemented</li> </ul>        | <ul style="list-style-type: none"> <li>Provide support and subject matter expertise to Leaders and Team Members through implementation</li> <li>Document and communicate project updates to the organization</li> </ul> |
| <div style="background-color: #fff9c4; border-radius: 15px; padding: 10px; width: 150px; margin: 0 auto;">           DEPARTMENT LEADERS<br/> </div>         | <i>Includes all Executive Directors of Departments</i>                          | <ul style="list-style-type: none"> <li>Strategic Advisory &amp; Oversight for the Resources Required to Implement Assigned Recommendation Projects</li> </ul>     | <ul style="list-style-type: none"> <li>Organize departmental resources to implement recommendations</li> <li>Manage day-to-day execution of activities for assigned recommendation projects</li> </ul>                  |
| <div style="background-color: #fff9c4; border-radius: 15px; padding: 10px; width: 150px; margin: 0 auto;">           TEAM MEMBERS<br/> </div>               | <i>Includes Manager to Frontline Employees not involved in the above groups</i> | <ul style="list-style-type: none"> <li>Drive, Collaborate and Support the activities required to Implement Recommendation Projects Appropriate to Role</li> </ul> | <ul style="list-style-type: none"> <li>Coordinate with Department Leaders and Team Members to execute implementation activities</li> <li>Collaborate across the organization to drive activities as required</li> </ul> |



# POTENTIAL CRITICAL-PATH IMPLEMENTATION ROADMAP

| #   | KEY PROJECT RECOMMENDATIONS                                   | IMPLEMENTATION TIMELINE      |   |   |   |   |   |   |   |  |  |   |   | STAKEHOLDER |     |     |    |   |
|---|---|------------------------------|---|---|---|---|---|---|---|--|--|---|---|-------------|-----|-----|----|---|
|   |   | Cadence of Project Execution |   |   |   |   |   |   |   |  |  |   |   | CLT         | CSC | DPL | TM |   |
| <b>SHORT / MEDIUM-TERM PROJECT IMPLEMENTATION</b> |   |                              |   |   |   |   |   |   |   |  |  |   |   |             |     |     |    |   |
| V3  | Formalize Customer Service Committee                          | ■                            |   |   |   |   |   |   |   |  |  |   |   |             | ◆   | ◆   |    |   |
| V1  | <b>Clarify CX Vision</b>                                      |                              | ■ |   |   |   |   |   |   |  |  |   |   |             | ◆   | ◆   | ◆  | ◆ |
| V2  | Define Town-Wide CX SLA's & KPI's                             |                              | ■ | ■ |   |   |   |   |   |  |  |   |   |             | ◆   | ◆   | ◆  |   |
| V6  | Develop a Consistent Service-Design Approach                  |                              | ■ |   |   |   |   |   |   |  |  |   |   |             | ◆   | ◆   | ◆  |   |
| T2  | Develop Job Summaries Across Departments                      |                              |   |   | ■ |   |   |   |   |  |  |   |   |             | ◆   |     | ◆  | ◆ |
| D9  | Perform an IT Systems & Requirements Inventory                |                              |   |   | ■ |   |   |   |   |  |  |   |   |             | ◆   |     | ◆  |   |
| V4  | Use Customer Profiles in Service-Design                       |                              | ■ |   |   |   |   |   |   |  |  |   |   |             | ◆   | ◆   |    |   |
| P2  | Develop Detailed Process & Journey Maps                       |                              |   |   | ■ | ■ |   |   |   |  |  |   |   |             |     | ◆   | ◆  | ◆ |
| D7  | Enable Online Payments:                                       |                              |   |   | ■ | ■ |   |   |   |  |  |   |   |             | ◆   |     | ◆  |   |
| D8  | Enable Online Account Access                                  |                              |   |   | ■ | ■ |   |   |   |  |  |   |   |             | ◆   |     | ◆  |   |
| D3  | Upgrade Telephony System                                      |                              |   |   | ■ | ■ |   |   |   |  |  |   |   |             | ◆   |     | ◆  |   |
| P4  | <b>Build an Organizational "Triage" Support Tool</b>          |                              |   |   |   | ■ | ■ |   |   |  |  |   |   |             |     | ◆   |    | ◆ |
| P5  | Develop "How-to" Submission Guides for Customers              |                              |   |   |   | ■ | ■ |   |   |  |  |   |   |             |     | ◆   |    | ◆ |
| D4  | Drive Organizational E11-System Adoption                      |                              |   |   | ■ | ■ |   |   |   |  |  |   |   |             | ◆   | ◆   | ◆  |   |
| D5  | Streamline Public Website                                     |                              |   |   |   | ■ | ■ |   |   |  |  |   |   |             |     | ◆   |    | ◆ |
| D6  | Promote Adoption & Availability of Self-Service               |                              |   |   |   | ■ | ■ |   |   |  |  |   |   |             |     | ◆   |    | ◆ |
| V5  | Streamline Service Communications Approach                    |                              |   |   |   |   | ■ | ■ |   |  |  |   |   |             |     | ◆   | ◆  | ◆ |
| <b>LONG-TERM / ONGOING PROJECT IMPLEMENTATION</b> |   |                              |   |   |   |   |   |   |   |  |  |   |   |             |     |     |    |   |
| T1  | <b>Provide Customer Service &amp; Service-Design Training</b> |                              |   |   |   |   | ■ | ■ |   |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| T3  | Gather Employee Feedback                                      |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| T4  | Increase Cross-Skilling of Employees                          |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| T5  | Build Information Sharing into Day-to-Day Behaviors           |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| P3  | Develop Detailed Service Policies & Procedures                |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| D1  | <b>Launch Customer Relationship Management Software</b>       |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| D2  | <b>Leverage Workflow Automation Software</b>                  |                              |   |   |   | ■ | ■ |   | ■ |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  | ◆ |
| P1  | Continue to Define & Prioritize Service Value-Add Areas       | ■                            | ■ | ■ |   |   |   |   |   |  |  | ■ | ■ | ■           | ◆   | ◆   | ◆  |   |

\* ◆ Key Stakeholders Involved in Implementation

CLT – Customer Leadership Team  
CSC – Customer Service Committee

DPL – Department Leadership  
TM – Employee Team Members

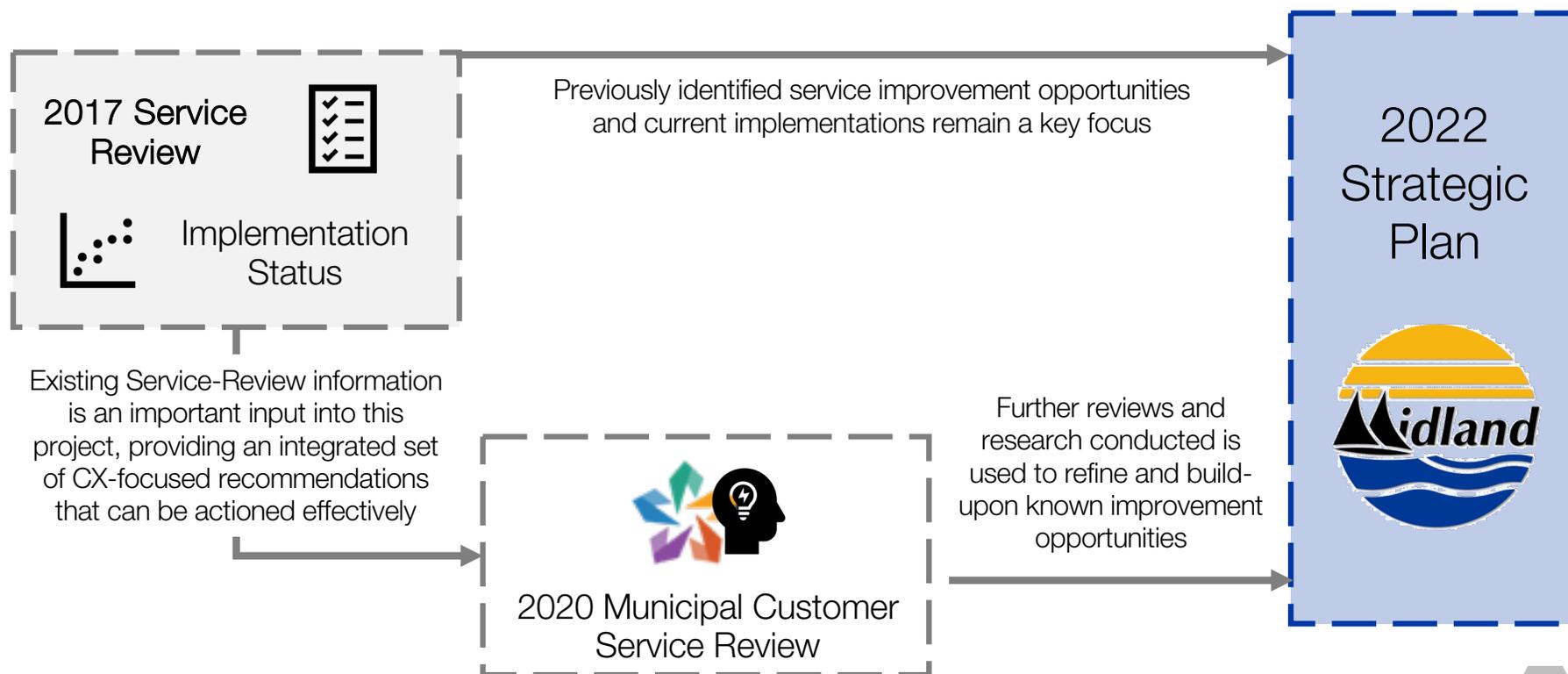


# Project Summary

## PROJECT BACKGROUND, GOALS & OBJECTIVES

The **Town of Midland** - like other municipalities - has increasingly high expectations from its customer-base on how, where, and when they want to be served. Midland's diverse and growing citizenry add to the complexity that municipal service-leaders face in defining and delivering great Customer Experiences (**"CX"**) & Service-Interactions. The service solution is not always about doing more with less, but rather about understanding the most critical areas to innovate and be strategic in the change that is set.

In the spirit of continuous improvement, the Town of Midland partnered with **CSPN** to build upon existing organizational knowledge (2017 Service Review) and conduct an updated **Municipal Customer Service Review** focused on improving the Customer Experience. The output will provide recommendations ahead of the 2022 strategic planning process.



## PROJECT BACKGROUND, GOALS & OBJECTIVES

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In order to answer the Town of Midlands strategic questions and provide an impactful, actionable Customer Service Review & Report the following organizational goals and project objectives are of primary focus – guiding the design and execution of all project activities, deliverables and outputs.



### TOWN'S ORGANIZATIONAL GOALS

- ✓ Continuously innovate and improve upon services delivered to meet the changing demands of Customers
- ✓ Modernize the delivery and interaction of services
- ✓ Maximize resource efficiencies to reduce process related time, effort and costs in delivering services



### PROJECT OBJECTIVES

- Review the current services and service delivery methods
- Review the similarities and differences between customer-groups
- Uncover customer perspectives of service needs, expectations and value-drivers
- Assess and Identify opportunities to improve current and future service-delivery interactions
- Recommend CX-driven improvement initiatives to be more efficient and effective in the sustainable delivery of customer service over the long-term
- Support the execution of improvement initiatives through action-plans and implementation maps



## PROJECT TEAM & DELIVERY SCOPE



**SHAWN ASHLEY**

**Title:** Manager, CX Consulting  
**Role:** Senior Consultant



**DAVID SINGH**

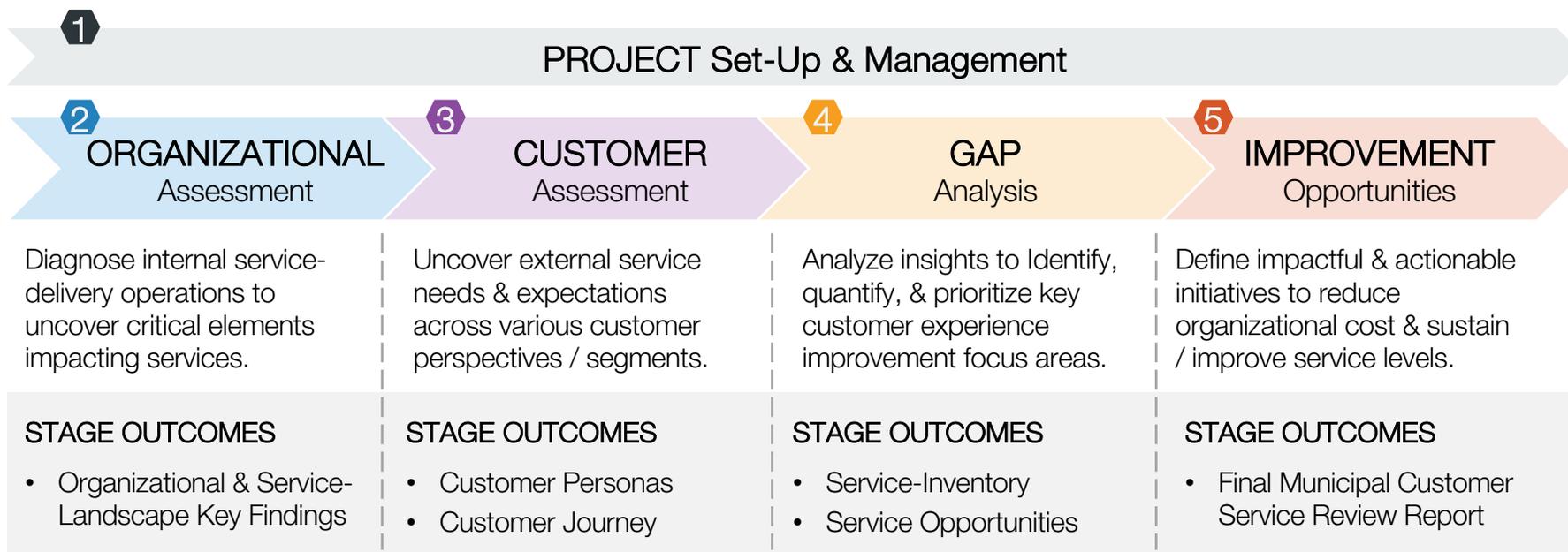
**Title:** Managing Partner  
**Role:** Project Delivery Lead



**JENNA FLORES**

**Title:** Community Manager  
**Role:** Project Support

## Overview of Project Approach & Stages



## PROJECT RESEARCH METHODOLOGY

CSPN’s research methods leverage **Lean Six Sigma (“LSS”)** and **Human-Centered Design (“HCD”)** principles to uncover both the operational and people side of Customer Service Experience. This unique and multifaceted approach includes qualitative, quantitative and ethnographic research activities to uncover a 360-degree view of perspectives while providing a rigorous, structured approach to data capture and analysis.

The following activities were conducted to drive effective collaboration and produce quality insights.

### Overview of Project Research Methodology





# The Midland Customer-Profile

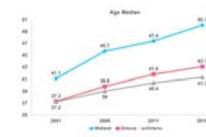


## APPLICATION OF CUSTOMER PROFILES

Knowing “**WHO**” your customer base is, continues to be a critical aspect of delivering great customer service. This understanding goes beyond general demographic data to uncover the key needs, wants and value-drivers of customers both at an overall level as well as at a “Customer Profile” level.

### 1) Understand Key Demographic Trends

- How does the overall shift in population characteristics impact the customer service experience?



### 2) Understand Overall Customer Sentiment

- How does the overall population feel about interacting with the Town across various services?



### 3) Understand Unique Customer Profiles

- How do unique groups of customers feel about interacting with the town across relevant services?
- Are there differences in the needs and expectations depending on the customer group?



As part of the Municipal Customer Service Review, **4 Customer Profiles** have been created to support the Towns understanding of the differences and similarities of different types of customers interacting with services.

The purpose of these profiles is to be **used as a tool while planning and executing service improvement initiatives**. By incorporating these artifacts into the conversation had by employees, Midland can keep the customer in focus and make decisions that have considered the varying effects improvements have on the different types of customers.

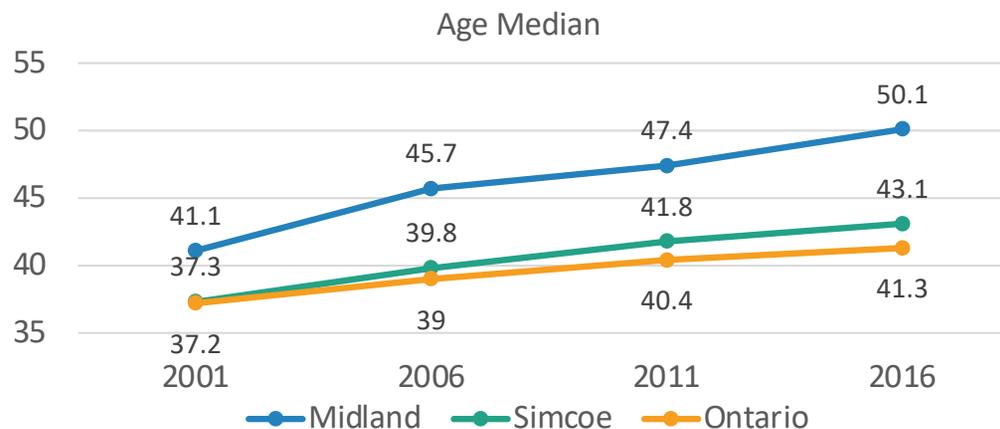


## CUSTOMER DEMOGRAPHICS & TRENDS

Based on census data, Midland has a growing population and is projected to continue over the coming years. These major demographic shifts are known to Midland and the Town is focused on addressing how the Customer Experience is evolving. The key changes in demographic characteristics that have an impact on the service experience include:

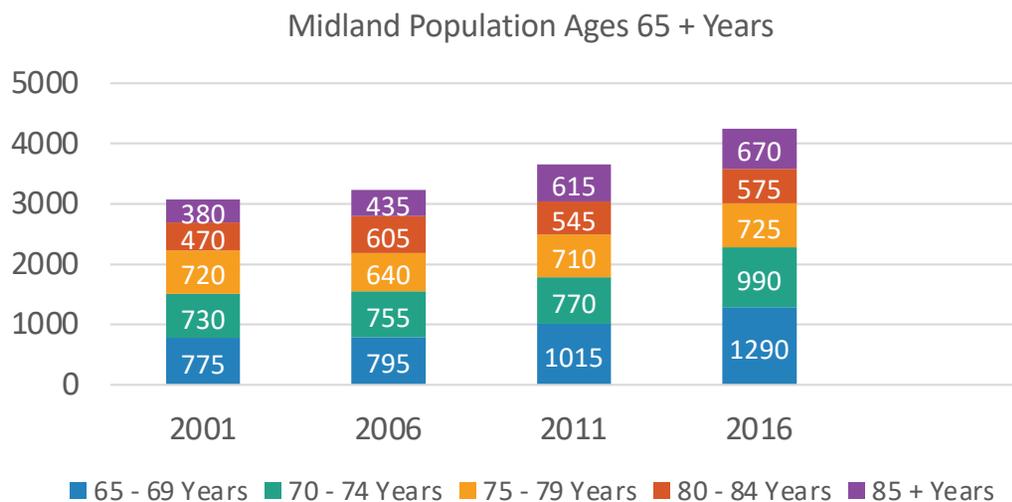
### Ageing Population

More pronounced than similar municipalities, the Town of Midlands population continues to increase in age with a median of 50.1 years in 2016\*.



### Age Cohorts

The distribution of the aging population also continues to increase overall, however weightings remain relatively consistent\*.



\*Midland Population Trends and Comparative Analysis (2001 – 2016 Census Data), 2018



# CUSTOMER SENTIMENT OF MIDLAND SERVICE



More important than the changes in demographic trends is the **customer sentiment of Midlands service-experience landscape.**

As part of the Municipal Customer Service Review an **external Customer Survey gathered insights and feedback from the Town of Midlands population** around their experiences had when interacting with the Town.

## Summary of Customer-Survey Insights

Overall Customer Experience & Service Satisfaction Score



### Top Service Expectations

- #1 Expertise / Accurate Information
- #2 Efficiency / Speed

### Most Important Service-Interactions

- I Want To...
- #1 Buy / Make a Payment for Something
  - #2 Get General Information / Support

### Most Important Service-Elements

- #1 Getting Things Done for me Accurately
- #2 Having Things Done Quickly

### Top Service Challenge / Issue Areas

- #1 Lack of Knowledge / Awareness of Available Services
- #2 Lack of Communications / Updates

### Top Service Positive / Enjoyment Areas

- #1 I can Typically get the Information / Answers I am Looking for
- #2 I am Aware of all the Great Things Midland is Doing – Share these Stories

### Top Desired Employee Behaviours

- #1 Direct me to the Appropriate Dept. / Person to Complete Service
- #2 Be Friendly & Courteous Throughout our Interactions

## OVERVIEW OF MIDLAND CUSTOMER PROFILES

Customer Profiles are **representations of segments within an overall target audience**. Fueled by data-driven research, they are generalized (often fictional) characters that encompass the various needs, goals, and behaviour patterns among real and potential customers. **Using Human-Centered Design philosophies the following four key Customer Profiles have been developed**, outlining what drives different customers and their unique psychological / emotional needs.

Organizing characters and stories this way helps to personify the generic “customer” into real life scenarios.



Citizen / Resident



Business / Groups



Tourist / Visitor



Teammate

|          |   |   |   |   |
|----------|---|---|---|---|
| OVERVIEW | <p>“The Town of Midland is where I’m proud to call home. As a member of a tight-knit community, I enjoy hearing about all of the great things that are happening and taking advantage of what’s offered.”</p> | <p>“I’m invested in the success and growth of the Town of Midland. As a member of the business community, I like to be informed for both short-term changes and long-term planning. I value the ability to easily engage with the Town / businesses.”</p> | <p>“The Town of Midland is a great getaway destination. As a visitor to the area, I want to experience all the Town has to offer while here. Being able to easily get lots of info. and do research makes planning the trip much easier.”</p> | <p>“The Town of Midland is where I chose to be a municipal teammate. As a public-service stakeholder, I’m passionate about making the Town a great place to live, growing both our service-experience and my professional development.”</p> |
| WHO I AM | <ul style="list-style-type: none"> <li>• Single Members</li> <li>• Families</li> <li>• Senior-Citizens</li> </ul>   | <ul style="list-style-type: none"> <li>• Enterprise / Developers</li> <li>• Small-Businesses</li> <li>• Associations</li> </ul>   | <ul style="list-style-type: none"> <li>• One-Off Tourists</li> <li>• Recurring Visitors</li> </ul>  | <ul style="list-style-type: none"> <li>• Departmental Staff</li> <li>• Interdepartmental Staff</li> <li>• Council Members</li> </ul>  |

\*Detailed Customer Profiles can be found in Appendix VII as well as been included as a separate artifact to the Town of Midland



# The Midland Service-Journey



# APPLICATION OF CUSTOMER JOURNEY MAPS

Knowing “HOW” customers interact with services is also a critical aspect to delivering great service. Understanding the end-to-end steps that customer goes through as well as the key activities / tasks required to be completed supports the ability to design services that meet the needs of customers while removing elements that do not add value.

## Journey Map Components

Journey Steps

Customer Emotions & Desires

Key Steps & Activities

Customer Pain Points & Wow Moments

Employee PainPoints & Wow Moments

Strategic Service Categories



As part of the Municipal Customer Service Review, 1 High-Level Customer Journey Map has been created to support the Towns understanding of the overall end-to-end step's customers experience when interacting with services.

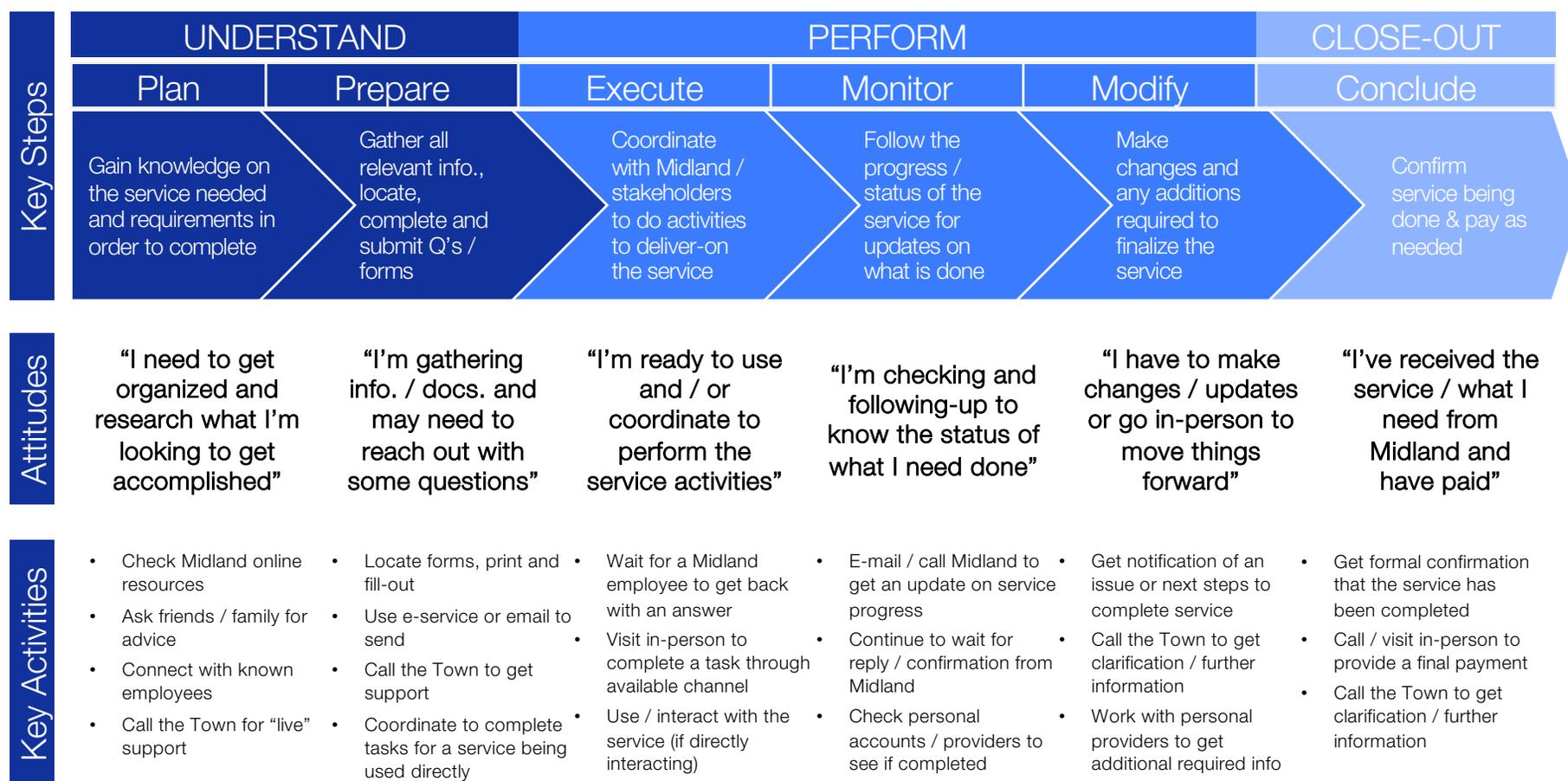
The purpose of this Journey Map is to be used as a tool while planning and executing service improvement initiatives. By incorporating this artifact, alongside profiles, into the conversation had by employees, Midland can keep the customer in focus and make decisions that have considered their varying effects on steps that customers must take and the value it delivers throughout their journey.



# THE MIDLAND CUSTOMER-SERVICE JOURNEY

The following high-level customer journey is built based on insights uncovered through the Customer Service Review.

This map outlines the “general” key steps and activities that customers work through when interacting with the Town for various services. Although a single service may not require all steps, the map is meant to illustrate an overview of the end-to-end service lifecycle for the more generic types of services.





# OVERVIEW OF MIDLAND CUSTOMER-SERVICE JOURNEY

A Customer Journey Map is a **Human-Centered Design** methodology used to understand customers – through diagrams, a Journey Map illustrates the steps customer(s) go through when engaging with a company to achieve a goal, whether it be a product, online, retail, or service relationship... or any combination. CJM's uncover the **“where” / “how” of customers** when interacting with services and **identify critical pain points / wow moments** along the way.

Visualizing service interactions this way helps to understand and communicate the complete end-to-end experience.

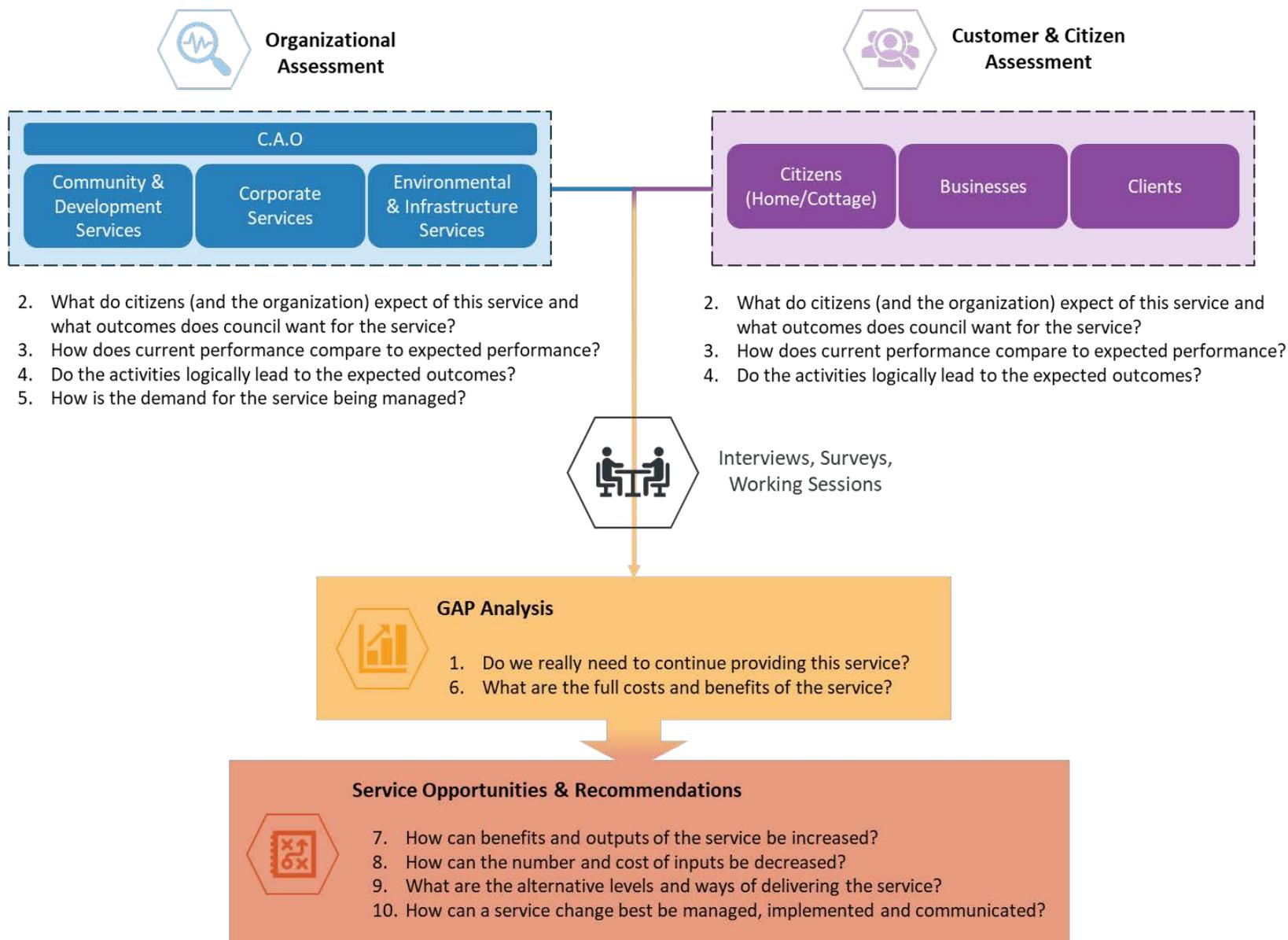


\*A full-sized Customer Journey Map can be found in Appendix VII as well as been included as a separate artifact to the Town of Midland



# Appendix

# APPENDIX I: PROJECT APPROACH SUMMARY





# APPENDIX I: PROJECT WORKPLAN DETAILS

| #  | KEY ACTIVITIES   | SPECIFIC TASKS   | PLANNED |        | REVISED |        | OUTCOMES & MILESTONES         |
|--|--|--|---------|--------|---------|--------|-------------------------------|
|  |  |  | START   | END    | START   | END    |                               |
| <b>1.0 PROJECT MANAGEMENT &amp; PLANNING</b>           |  |  | 20-Jul  | 24-Jul |         |        |                               |
| 1.1  | Confirm Project Scope, Objectives and Validate Work Plan                               |  | 20-Jul  | 21-Jul |         |        | Project Work Plan & Charter   |
| 1.2  | Develop Project Charter, Work Book & Tools   |  | 20-Jul  | 23-Jul |         |        |                               |
| 1.3  | Facilitate Formal Project Kick-Off Session   | Prepare & deploy Project Management collaboration collateral and platforms                                   |         |        |         |        |                               |
|  |  | Prepare Project Kick-Off materials and presentation collateral   | 21-Jul  | 23-Jul |         |        |                               |
|  |  | Conduct one (1) virtual 1hr session with key stakeholders (participants TBD)                                 |         | 24-Jul |         |        | Project Kick-Off              |
| 1.4  | Facilitate Status Update Meetings  |  | ongoing |        |         |        | Status Updates                |
|  |  | Conduct biweekly virtual 30-60min sessions with the Town Project Managers                                    |         |        |         |        |                               |
| <b>2.0 ORGANIZATIONAL ASSESSMENT</b>                   |  |  | 20-Jul  | 04-Sep |         |        |                               |
| 2.1  | Gather all Relevant Existing Information Available within the Town                     |  |         |        |         |        |                               |
|  |  | Prepare document request and collaborate to gather all key service-operations information                    | 20-Jul  | 07-Aug |         |        |                               |
| 2.2  | Review / Assess Organizational and Departmental Service-Related Information            |  |         |        |         |        |                               |
|  |  | Assess existing service-models to form baseline understanding  | 27-Jul  | 07-Aug |         |        |                               |
|  |  | Leverage knowledge to build interview research design and session questions / materials                      | 27-Jul  | 07-Aug |         |        |                               |
| 2.3  | Facilitate Internal Stakeholder Interviews Across Departments / Stakeholders           |  |         |        |         |        |                               |
|  |  | Conduct all Internal Interviews & Workshops - Full List found in "Org Assess - Research Guide)               | 03-Aug  | 21-Aug |         | 27-Aug |                               |
| 2.4  | Prepare Baseline Service-Interaction Inventory   |  |         |        |         |        | Organizational Key Findings   |
|  |  | Analyze gathered insights - build summary of key internal service-operations findings                        | 17-Aug  | 04-Sep |         |        |                               |
| <b>3.0 CUSTOMER &amp; CITIZEN ASSESSMENT</b>           |  |  | 31-Aug  | 02-Oct |         |        |                               |
| 3.1  | Prepare Research Design and Materials for Customer / Citizen Insights Gathering        |  |         |        |         |        |                               |
|  |  | Organize objectives, targeted participants / groups, and survey channels                                     | 24-Aug  | 28-Aug |         |        |                               |
|  |  | Build survey design, question-set, activities and participant guide / intro comms - send out to participants | 24-Aug  | 28-Aug |         |        |                               |
| 3.2  | Deploy and Manage Customer / Citizen Insights Gathering Survey                         |  |         |        |         |        |                               |
|  |  | Push Survey Live   | 31-Aug  | 02-Oct | 21-Sep  | 09-Oct |                               |
|  |  | Collect and analyze incoming data  | 31-Aug  | 02-Oct | 21-Sep  | 09-Oct |                               |
|  |  | Manage incoming issues and questions from participants   | 31-Aug  | 02-Oct | 21-Sep  | 09-Oct |                               |
| 3.3  | Prepare Preliminary Draft Assessment of Key Findings                                   |  |         |        |         |        | Customer Key Findings         |
|  |  | Analyze gathered insights - build summary of customer expectations, desired outcomes and satisfaction        | 28-Sep  | 02-Oct |         |        |                               |
| <b>4.0 GAP ANALYSIS</b>                                |  |  | 05-Oct  | 16-Oct |         |        |                               |
| 4.1  | Perform Comprehensive GAP Analysis Incorporating Organizational & Customer Insights    |  |         |        |         |        |                               |
|  |  | Leverage 10-question set to define preliminary need and internal / external service delivery performance     | 05-Oct  | 09-Oct |         |        |                               |
| 4.2  | Identify & Prioritize Impactful Service Operations / Cost Improvement Opportunities    |  |         |        |         |        |                               |
|  |  | Define impactful focus areas and criteria to reduce costs and improve operational service delivery           | 12-Oct  | 16-Oct |         |        |                               |
| 4.3  | Identify & Prioritize Impactful Service Modernization Improvement Opportunities        |  |         |        |         |        |                               |
|  |  | Define impactful focus areas and criteria to empower customers / citizens and modernize service delivery     | 12-Oct  | 16-Oct |         |        |                               |
| 4.4  | Leverage GAP Analysis to Prepare Complete Service-Interaction Inventory                |  |         |        |         |        | Service-Interaction Inventory |
|  |  | Outline a comprehensive list of individual service performance based on question-set                         | 12-Oct  | 16-Oct |         |        |                               |
|  |  | Identify prioritized improvement opportunities to focus recommendations                                      | 12-Oct  | 16-Oct |         |        |                               |
| <b>5.0 SERVICE OPPORTUNITIES &amp; RECOMMENDATIONS</b> |  |  | 19-Oct  | 20-Nov |         |        |                               |
| 5.1  | Ideate Service Improvement Recommendations   |  |         |        |         |        |                               |
|  |  | Balance Organizational and Customer service needs to define actionable service changes                       | 19-Oct  | 23-Oct |         |        |                               |
|  |  | Incorporate CX best-practices and the Towns unique CX landscape into recommendations                         | 19-Oct  | 23-Oct |         |        |                               |
| 5.2  | Prepare Service Action Planning Outline  |  |         |        |         |        | Implementation Planning       |
|  |  | Outline the implementation and management planning needs for recommended service changes                     | 19-Oct  | 23-Oct |         |        |                               |
|  |  | Outline the internal / external communications planning needs for recommended service changes                | 19-Oct  | 23-Oct |         |        |                               |
| 5.3  | Develop Final Report of all Collateral and Deliverables Created Throughout the Project |  |         |        |         |        |                               |
|  |  | Organize and integrate all project outputs into a single compressive report                                  | 19-Oct  | 26-Oct |         |        |                               |
|  |  | Prepare presentation materials of all project outcomes   | 19-Oct  | 26-Oct |         |        |                               |
| 5.4  | Facilitate Review Cycle of Final Report  |  |         |        |         |        |                               |
|  |  | Share Draft Final Report and conduct review activities / sessions with relevant stakeholders                 | 26-Oct  | 06-Nov |         |        |                               |
| 5.5  | Facilitate Final Share-Out Session of Complete Report                                  |  |         |        |         |        | Final Report                  |
|  |  | Conduct one (1) virtual 2hr sessions with all relevant stakeholders (participants TBD)                       |         | 18-Nov |         |        |                               |



## APPENDIX II: PRIORITIZATION CRITERIA OPERATIONAL DEFINITIONS

Quantitative scoring & Ranking criteria for prioritization of improvement recommendations.

| Segment Description  | Metrics  | Measurements  |
|--|--|---|
| <p><b>High-Priority Initiatives</b><br/>           Initiatives with significant improvement potential on both the CX &amp; Business Performance – act as a foundational need to continue Midlands transformation</p>       | <ul style="list-style-type: none"> <li>• Impact on Customer Experience               <ul style="list-style-type: none"> <li>○ (low impact 1 – 8 high impact)</li> </ul> </li> <li>• Impact on Business Performance               <ul style="list-style-type: none"> <li>○ (low impact 1 – 8 high impact)</li> </ul> </li> <li>• Effort Required to Implement Initiative               <ul style="list-style-type: none"> <li>○ (low effort 1 – 8 high-effort)</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Aggregate of data from CX &amp; Business impact</li> <li>• Analysis of effort data based on time, steps, tasks and cost</li> </ul> |
| <p><b>Medium-Priority Initiatives</b><br/>           Initiatives with significant improvement potential on both the CX &amp; Business Performance – may require major effort / capital expenditure to be implemented</p>   |  |   |
| <p><b>Low-Priority Initiatives</b><br/>           Initiatives with high improvement potential on CX – may require major effort or act as a “sustainability” type of activity to be implemented after other initiatives</p> |  |   |



## APPENDIX II: FINDINGS & RECOMMENDATIONS OPERATIONAL DEFINITIONS

To support the understanding of Findings & Recommendations, below outlines the definitions for each component of the review-content found within the Midland Service-Landscape section of the report.

| #  | Findings & Observations   |
|--|---|
| <b>Description:</b><br>Unique ID<br>Code | <b>Description:</b><br>Outlines key positive / negative service-related insights. Findings are based all internal / external data captured and analyzed within the Customer Service Review. |

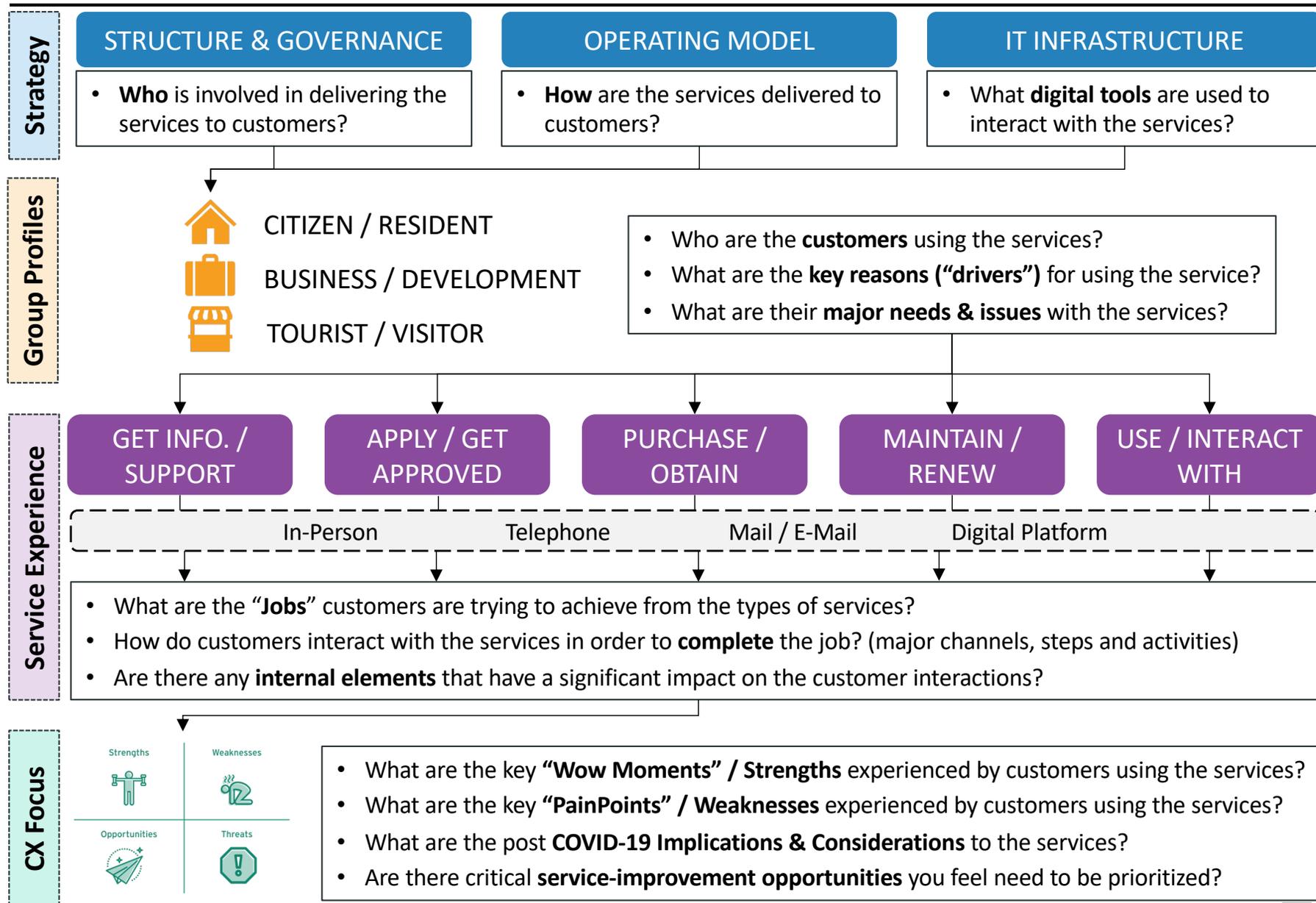
| #  | Key Opportunities & Recommendations  | Previous Projects  | Impacts<br>(Cost / Time / Benefit)  |
|--|--|--|---|
| <b>Description:</b><br>Unique ID<br>Code | <b>Description:</b><br>Outlines key service-related improvement opportunities and impactful recommendations uncovered within the Customer Service Review | <b>Description:</b><br>Outlines previous and ongoing projects within the Town of Midland related to Key Opportunities and Recommendations.<br><br>Projects are identified from the 2017 Service Report and subsequent formal status update of the initiatives. | <b>Cost Description:</b><br>Outlines the directional implementation costs to execute the recommendation<br><br><b>Time Description:</b><br>Outlines the directional implementation time to execute the recommendation<br><br><b>Benefit Description:</b><br>Outlines the major benefit type / area to effectively implementing the recommendation |



## APPENDIX IIIA: EXISTING DATA-REVIEW DOCUMENT LIST

| #  | Category           | Document Description   |
|----|--------------------|--|
| 1  | Policy & Procedure | Bi-Law to Establish and Approve the Fees and Charges of the Town of Midland – Amended by B-Law 2020-09 |
| 2  | Service Delivery   | Comprehensive List of Town Applications and Forms  |
| 3  | Customer Data      | Midland Age Friendly Insights – Survey Responses   |
| 4  | Customer Data      | Midlands Biggest Challenges – Survey Response Data   |
| 5  | Finance            | Staff Report FIN-2020-01 Budget 2020 Approval  |
| 6  | Organization       | 2018-2022 Council Strategic Priorities-Final   |
| 7  | Customer Data      | E11 Detailed Case-Data Spreadsheet   |
| 8  | Technology         | Comprehensive list of Current IT Infrastructure Systems / Applications Inventory                       |
| 9  | Finance            | Financial Reporting Documentation - 2019-12-31 Town of Midland-FS                                      |
| 10 | Organization       | CAO-2017-10 MIDLAND SERVICE DELIVERY REVIEW Final  |
| 11 | Customer/ Citizen  | Council Information Package – Example Share-Out  |
| 12 | Policy & Procedure | CP-2019-07 Customer Service Standards Policy FINAL   |
| 13 | Policy & Procedure | CS-2019-01 Telephone SOP   |
| 14 | Policy & Procedure | CS-2019-01 Telephone SOP   |
| 15 | Policy & Procedure | CS-2019-03 E-Service Midland SOP   |
| 16 | Organization       | Detailed Midland Service-Offering List – By Department   |
| 17 | Organization       | E-Service Midland Case workflow  |
| 18 | Technology         | Comprehensive Review of Existing Digital Channels – Website, Socials, Engaging Midland, E-Service      |
| 19 | Technology         | IT System – Virtual City Hall (References)   |
| 20 | Organization       | MD-17-01 SERVICE DELIVERY REVIEW REPORT FINAL  |
| 21 | Customer Data      | Midland Population Trends and Comparative Analysis   |
| 22 | Organization       | One-Window CS Services Provided - Town Hall  |
| 23 | Organization       | Report CAO-2019-10 Service Delivery Review 2019 Update-FINAL   |

# APPENDIX IIIB: INTERVIEW & WORKSHOP DISCUSSION APPROACH





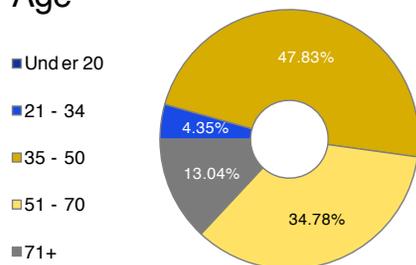
## APPENDIX V: CUSTOMER SURVEY DETAILS

### Survey Deployment Details

- Survey Timeframe: October 1, 2020 – November 20, 2020
- Deployment Channels: Mass distribution via Engaging Midland / Socials & Targeted distribution direct to key contacts

### Survey Respondent Demographic Details

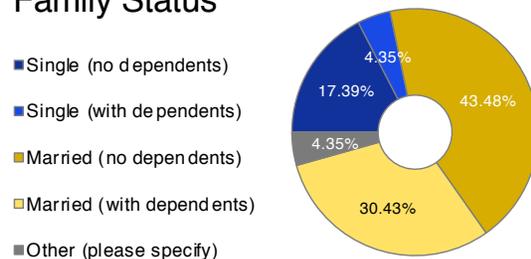
#### Age



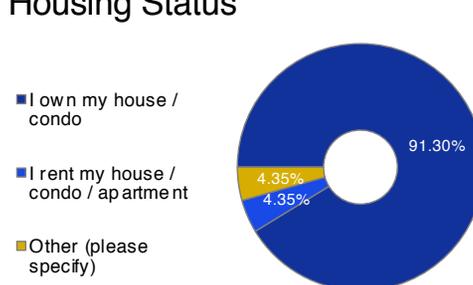
#### Tenure



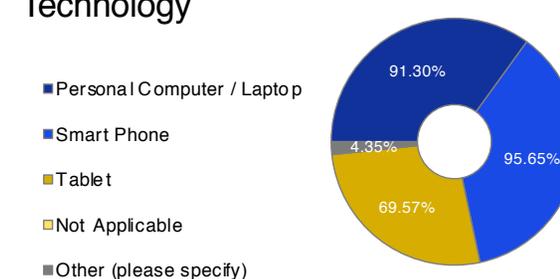
#### Family Status



#### Housing Status



#### Technology





## APPENDIX V: CUSTOMER SURVEY DETAILS

### INSTRUCTIONAL OVERVIEW / INTRODUCTION

This survey is designed as part of an initiative to help the Town of Midland better understand how it is serving its citizens / stakeholders. The goal of the project is to hear different perspectives, uncovering how a select group interact with the Town of Midland and its services as well as how those experiences can be improved.

For reference, the definition of “services” we are using involve those that are **directly delivered by the Town of Midland and NOT those provided by the County of Simcoe (e.g. Garbage / Recycling collection).**

| Example Midland Services  |
|---|
| <ul style="list-style-type: none"><li>• Paying Property Taxes, Tickets, Fines, etc.</li><li>• Obtaining Permits, Licenses, Tags</li><li>• Booking / Using Outdoor and NSSRC Facilities</li><li>• Performing Snow Removal, Grass, Trails, and General Road Maintenance and Construction (Public Areas)</li><li>• Gathering General Information / Inquiries</li><li>• Attending Tourism, Culture and Local Events</li></ul> |

There are numerous specific services offered that different stakeholders may or may not interact with. This survey looks to gather your general insights based on overall Categories – additional context to your unique experience can be provided throughout the survey in “free-fill” questions.

All information and comments received will be compiled and considered by staff for use under the purposes of this site and the specific project for which it is collected. Information will be collected and used in accordance with the Municipal Freedom of Information and Protection of Privacy Act and other relevant legislation. All comments made on this site are available to the public, including the name and email address of the submitter (if provided), and may form part of the public record.

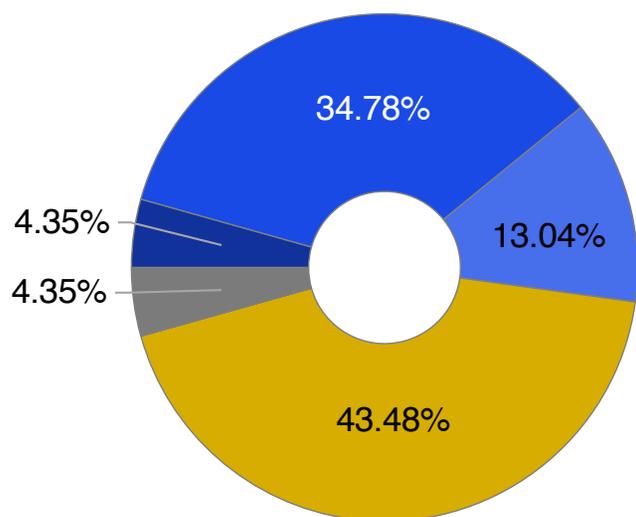


## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #1

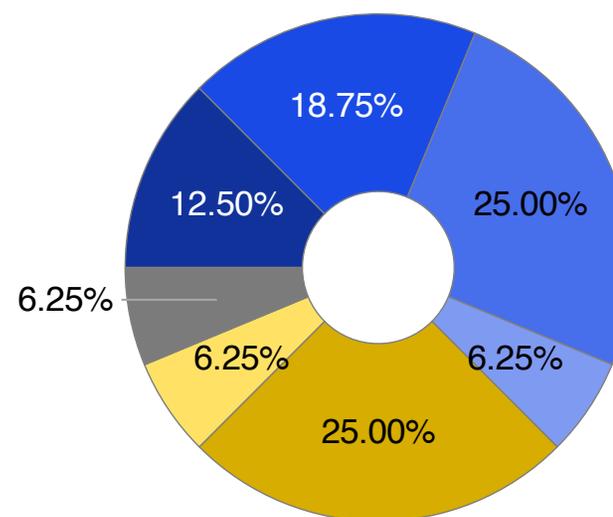
Please complete the following sentence by selecting the TWO (2) words that BEST represent your expectations. "At the end of an interaction with the Town of Midland I want to feel a sense of..."

#### 1st Word



- Simplicity / Ease of Use
- Efficiency / Speed
- Expertise / Accurate Information
- Safety / Security
- Courtesy / Professionalism
- Accountability
- Value for Time
- Other

#### 2nd Word



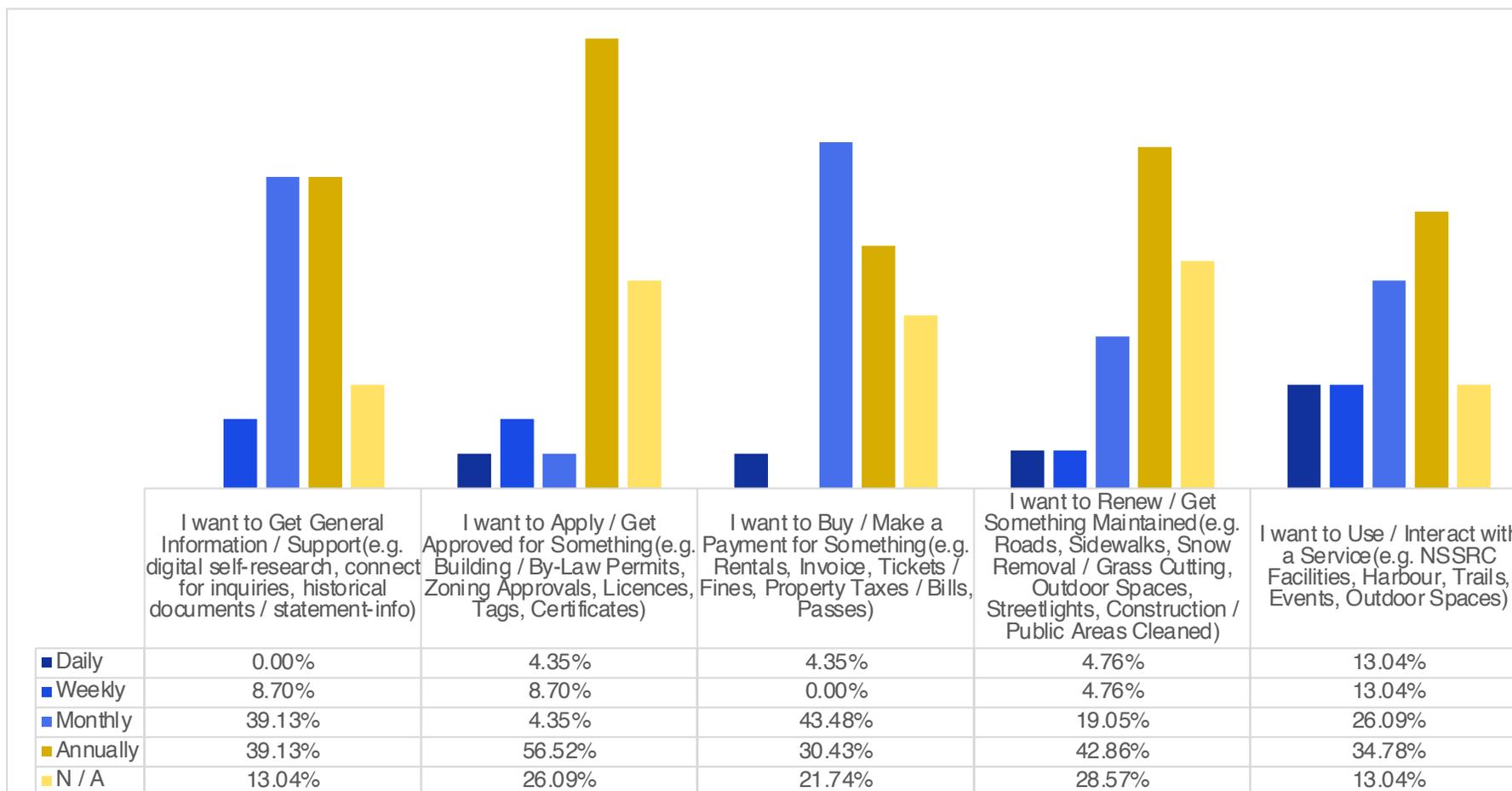
- Simplicity / Ease of Use
- Efficiency / Speed
- Expertise / Accurate Information
- Safety / Security
- Courtesy / Professionalism
- Accountability
- Value for Time
- Other



## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #2

How often do you interact with the Town of Midland to complete the following “Jobs / Tasks”?  
(Please select the most appropriate option for each)



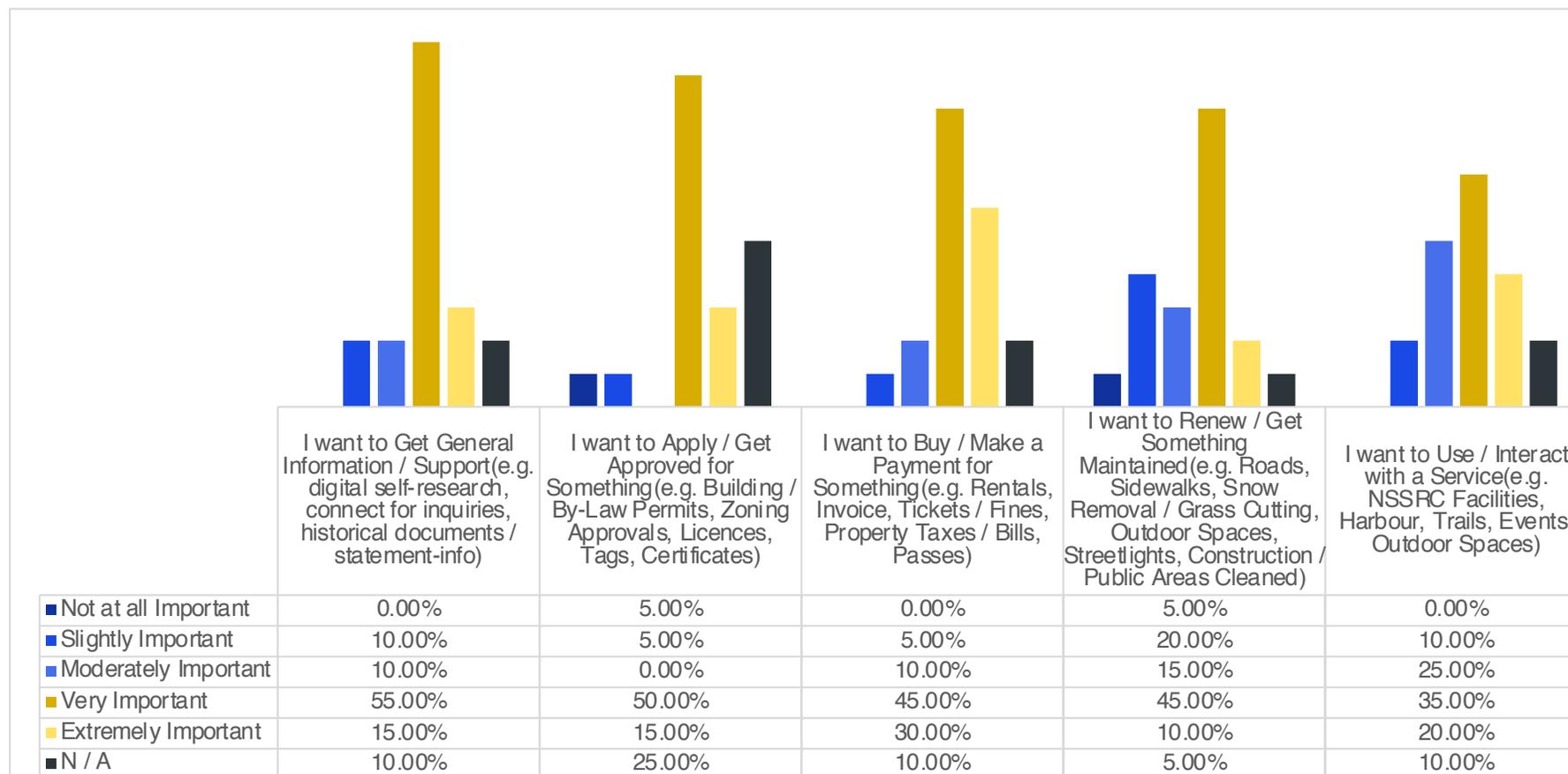


## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #3

For the following general service groupings, how IMPORTANT is each to you and your ability to use / complete to achieve your desired outcome.

(Please rate each service grouping on the following scale – if the service group is not used / applicable to you, mark N/A)

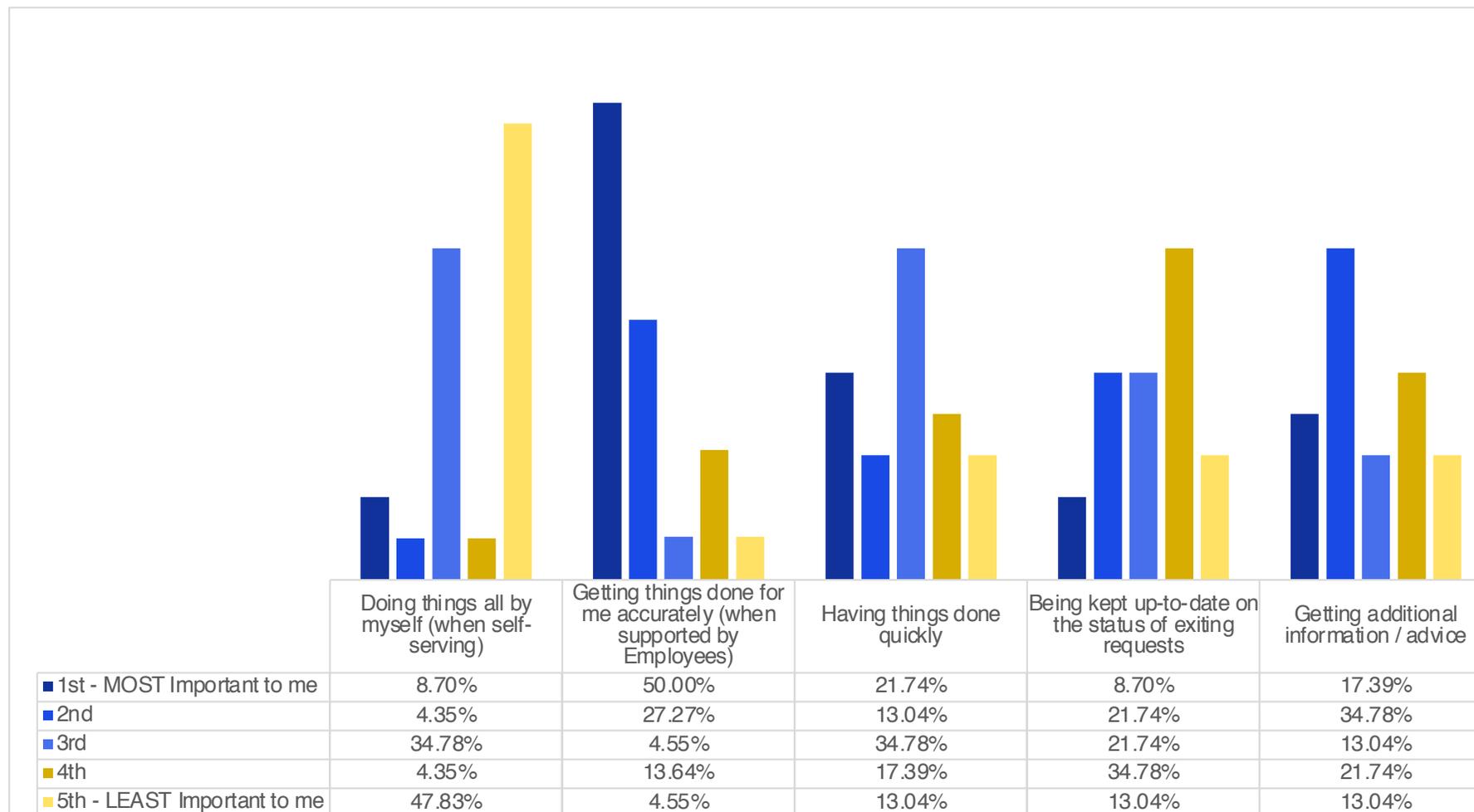




## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #4

In general, what is the MOST IMPORTANT element you are looking for when interacting with the Town of Midland services?

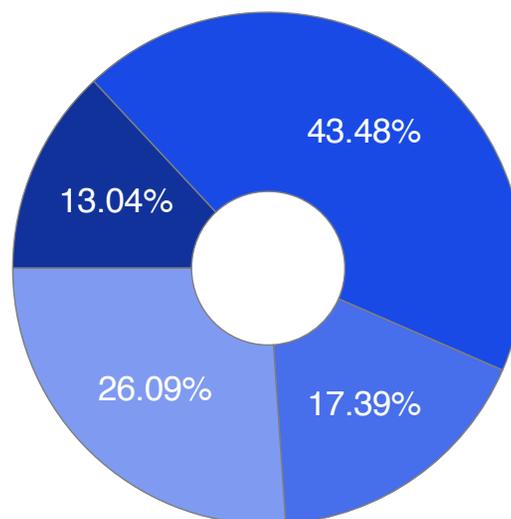




## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #5

In general, when interacting with the town to get something done, I can typically do so by \_\_\_\_\_:  
(Please select the option that fills in the sentence)



- Doing it myself
- Having a quick phone call / email exchange with one person
- Having a lengthy phone call / email exchange with one person
- Interacting / speaking with multiple people before I get what I want done

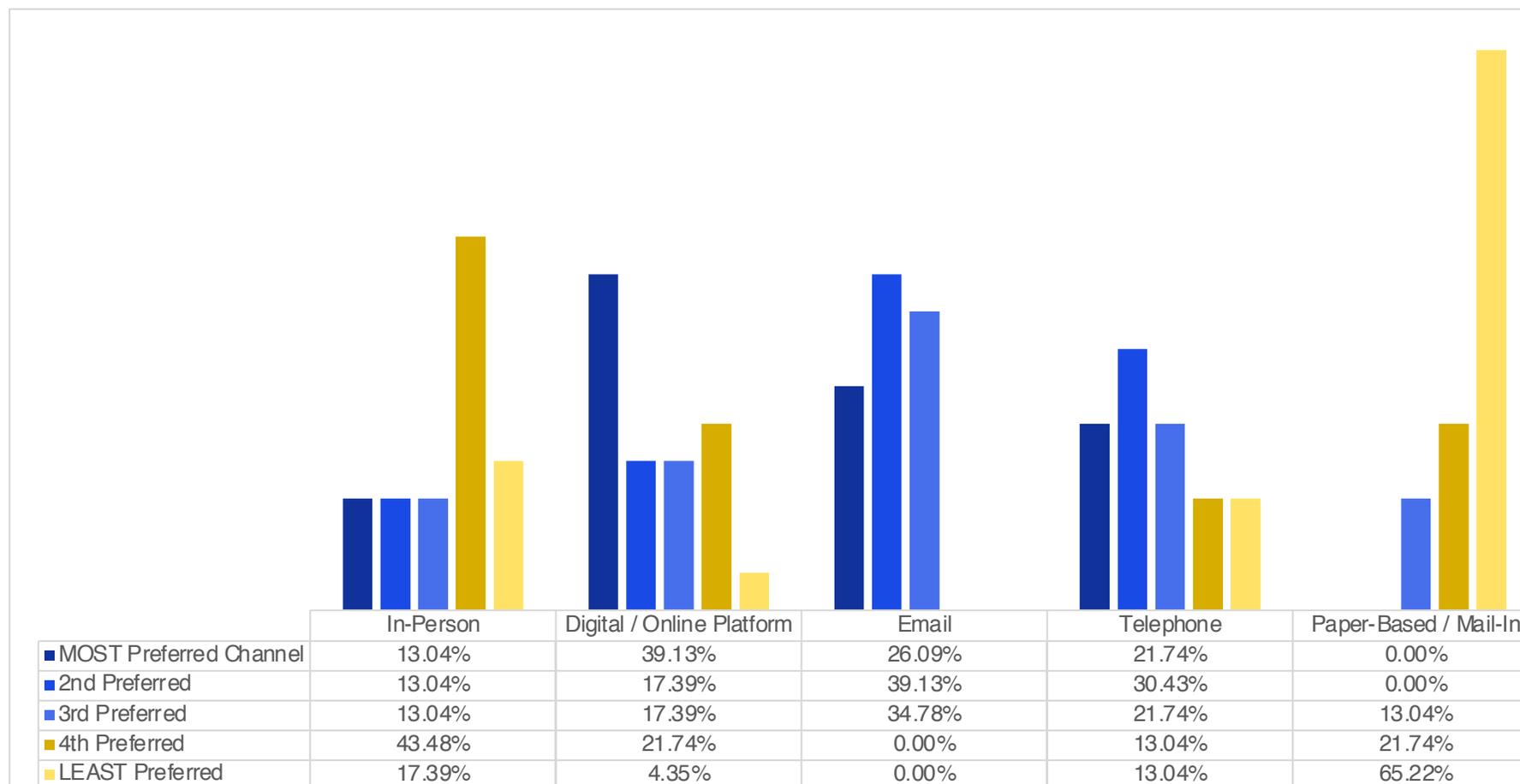


## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #6

Looking towards an ideal futuristic state, which channels would you prefer to use when interacting with the Town of Midland.

(Please rank from most to least important)





## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #7

For your MOST PREFERRED service channel above, describe the ONE (1) key aspect you would change to improve how you interact with the Town of Midland.

Faster Call  
Response  
Times

Website  
lacked detail  
about  
services,  
bylaws and  
procedures

Website to be  
current and  
accurate

More  
information on  
Website

Improve  
search  
capabilities

Efficiency

More online  
options for  
financial  
transactions

Important  
notifications  
received as a  
resident by  
email more  
often

Permits  
should have  
online  
applications

More online  
services (e.g.  
fire permits)

More call  
representative  
s available to  
take calls

More  
responsiveness  
via email

More  
empathy and  
understanding  
on phone

Coherent  
information  
organization /  
design

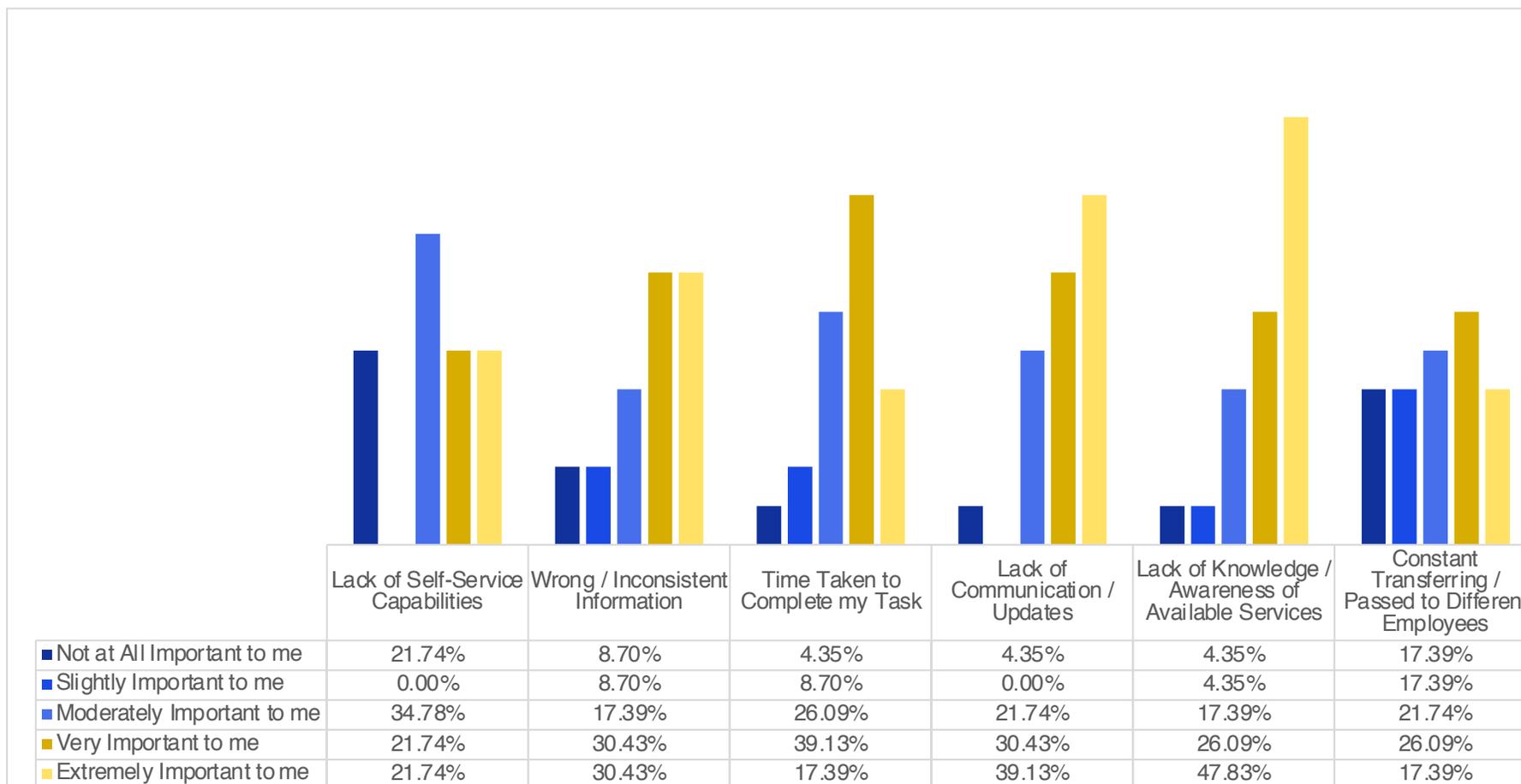
Live and  
informed  
phone routing



## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #8

What do you consider to be the areas that cause most issues / frustration when interacting with the Town of Midland?  
(Please rate on the following scale)

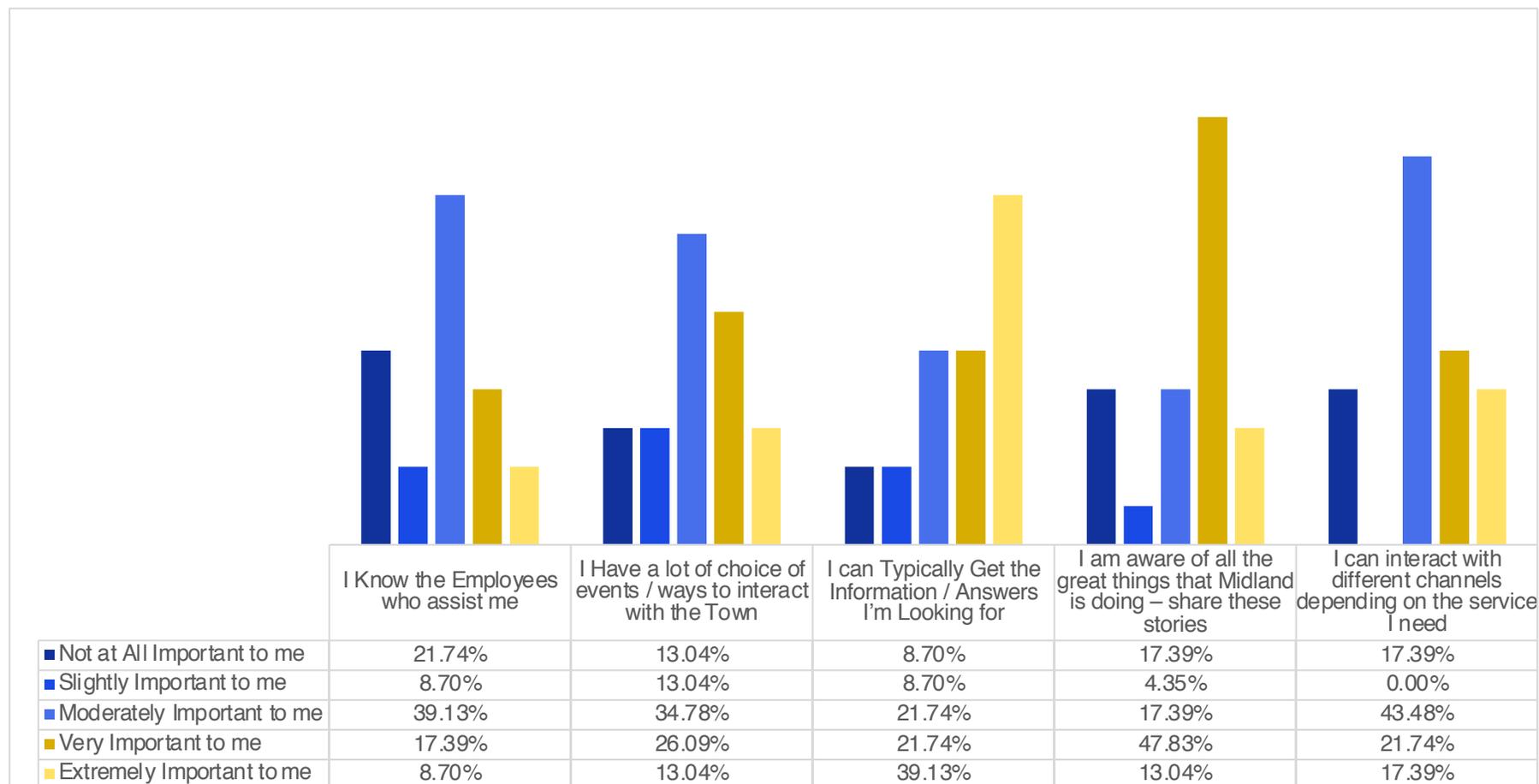




## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #9

What do you consider to be the areas that are most positive / enjoyable when interacting with Midland services?  
(Please rate on the following scale)



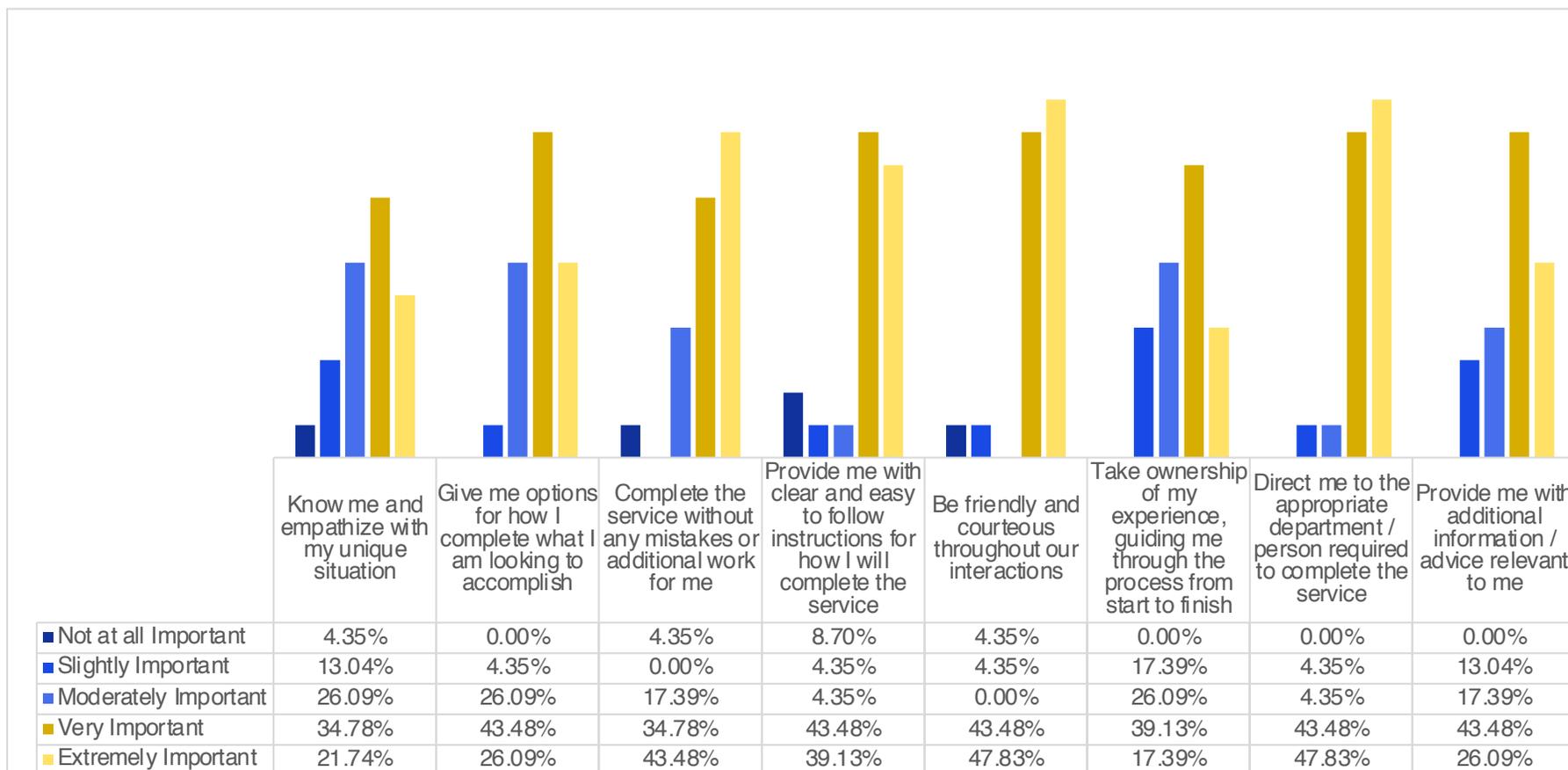


## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #10

Consider your current and future interactions with the Town of Midland, How important to you are the following behaviors when demonstrated by employees?

(Please rank each behaviour along the given scale)

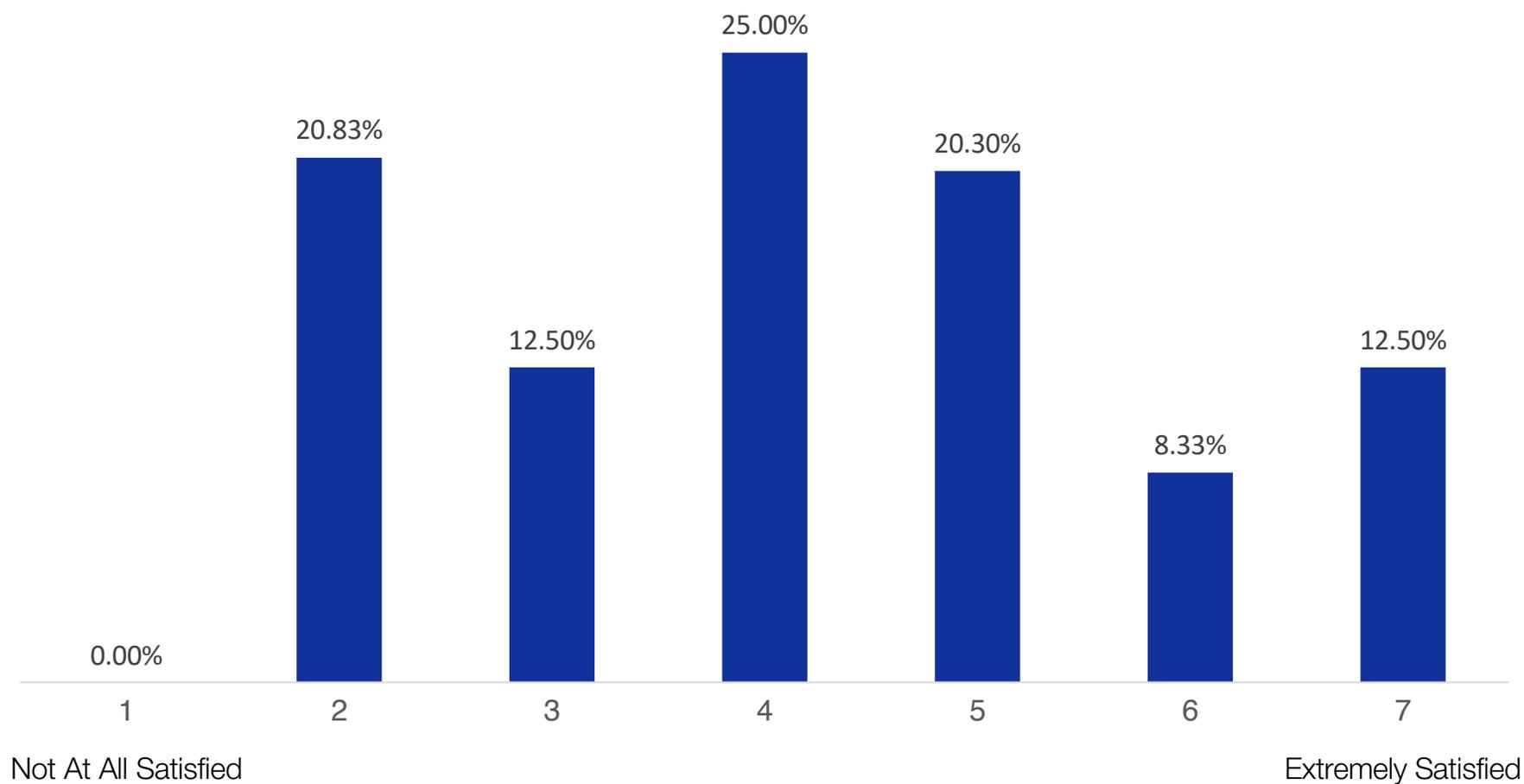




## APPENDIX V: CUSTOMER SURVEY DETAILS

### Question #11

How would you rank your overall satisfaction with the customer service received from the Town of Midland?





## APPENDIX V: CUSTOMER SURVEY DETAILS

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### Question #12

Are there any key issues and / or improvement areas with the Town of Midland's Customer Service you would like to address?

(Please describe below)

#### Vision & Strategy

- Need good paying jobs here not min wage we can't survive on min wage jobs.
- Allow garage shelters for all to the end of their driveways.
- Downsize council and run the town responsibly.

#### Talent

- People have mental / physical disabilities related to bylaws (snow removal)
- Constant change in the town office, now hard to find the staff member I need to speak to.
- Very impersonal to go in, not as friendly as it used to be.
- Treat the citizen the same as the corporate big money investor in your town.
- Increase staffing with the necessary competencies and attitudes.
- Hire qualified progressive people that know what they are doing.

#### Process

- Timelines for responses to questions could improve.
- Emailed about dogs off leash and didn't get a response. Dogs off leash is an ongoing issue.
- There is documented cronyism with your building inspector.
- No way to find the right person. It is impersonal. Hard to talk to a human.
- It takes months to get important maintenance work done.

#### Digital

- Online billing and payment options (taxes, water & sewer).
- Better phone system or upgrade.



*“The Town of Midland is where I’m proud to call home.*

*As a member of a tight-knit community, I enjoy hearing about all the great things that are happening and taking advantage of whats offered.*

*Midland is my primary residence which means I am continuously interacting with the Town for a number of services, both formal and social. Because of this, its important that I can get things done on my own with clear instructions for what I need to do.*

*It can sometimes be confusing and time consuming to get what I need done so having friendly and knowledgeable support that can guide me through to the end makes me feel like the Town is there for me.”*

## CHARACTERISTICS & DRIVERS

### WHO I am

Single



*As someone with no dependents, I don't interact with a lot of what Midland offers.*

Family



*As a family unit, we like to interact with everything Midland has to offer.*

Senior



*As part of the aging population, I know Midland and have interacted for years.*

### WHY I interact with Midland



I mostly want to use / interact with available services



I am looking to get accurate & up-to-date information / guidance

### WHAT matters to me most when interacting with Midland



Staying up-to-date / informed on changes to the Town & the services available to me



Having my service-needs taken care of the first time with no issues or problems



Being able to easily buy or make a payment for the services I use



*"The Town of Midland is where I'm proud to call home."*

*As a member of a tight-knit community, I enjoy hearing about all the great things that are happening and taking advantage of whats offered.*

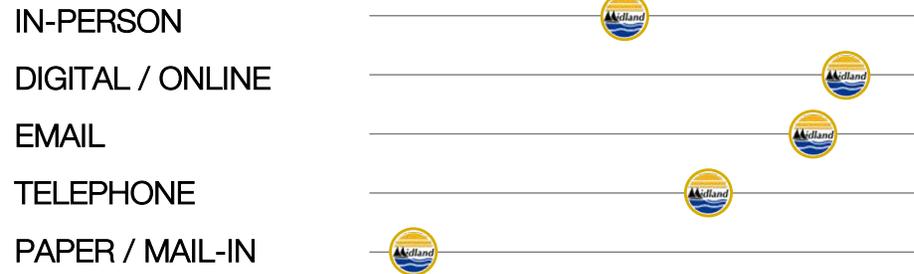
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*It can sometimes be confusing and time consuming to get what I need done so having friendly and knowledgeable support that can guide me through to the end makes me feel like the Town is there for me."*

# SERVICE INTERACTION

## HOW I interact with Midland

LEVEL OF PREFERENCE / IMPORTANCE



DAILY      WEEKLY      MONTHLY      ANNUALLY

### I WANT TO...



For my service needs, I typically interact / speak with multiple people before I get what I want done



*"I'm invested in the success and growth of the Town of Midland.*

*As a member of the business community, I like to be informed and have my finger on the pulse for both short-term changes and long-term planning. I really value the ability to easily engage with the Town and other businesses.*

*Midland is a key area where I conduct business which means I am continuously interacting with the Town for a specific set of services. Because of this, its important that I have a support-structure of expertise that know my business and can get what I need done quickly and without issues. My business moves fast so having options for how I can get things done lets me better control my schedule."*

## CHARACTERISTICS & DRIVERS

### WHO I am

#### Enterprise



*As major corporations / developers, we have large-scale & continuous service needs*

#### Small-Business



*As small-to-medium sized organization, we have somewhat unique & specific service needs*

#### Association



*As an Association, we look to engage & support businesses within the Town of Midland*

### WHY I interact with Midland



I mostly want to apply or get approved for something



I am looking to get a specific activity / task done as quickly as possible

### WHAT matters to me most when interacting with Midland



Staying up-to-date & informed on changes to the Town & the services available to me



Minimizing the turnaround time it takes to complete my service need



Being a part of the business community, utilizing available services & resources

MIDLAND PROFILE  
**BUSINESS / GROUP**



*"I'm invested in the success and growth of the Town of Midland."*

*As a member of the business community, I like to be informed and have my finger on the pulse for both short-term changes and long-term planning. I really value the ability to easily engage with the Town and other businesses.*

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# SERVICE INTERACTION

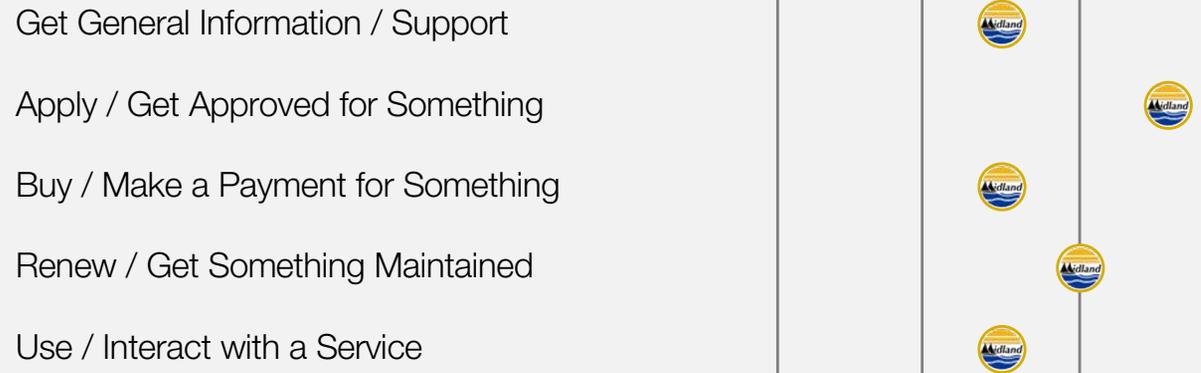
## HOW I interact with Midland

LEVEL OF PREFERENCE / IMPORTANCE



DAILY      WEEKLY      MONTHLY      ANNUALLY

### I WANT TO...



For my service needs, the amount of effort can vary a lot between having a quick phone call / email exchange to interacting / speaking with multiple people before I get what I want done



*"The Town of Midland is a fantastic getaway destination.*

*As a visitor to the area, I want to experience as much as the Town has to offer while here. Being able to easily get lots of information and do research makes planning the trip much easier.*

*Midland is relatively new to me which means I am not very familiar with the services available that I can take advantage. Because of this, its important that I can quickly access support that can answer my questions and even give me some advice or suggestions.*

*Whether I'm by myself or with others, having a friendly face I can count on goes a long way to making the most out of the trip."*

## CHARACTERISTICS & DRIVERS

### WHO I am

#### Recurring Visitor



*As a cottage owner / recurring visitor, I'm familiar with the town of Midland & services offered*

#### One-Off Tourist



*As a tourist, I'm visiting for one-of the first times & don't know a lot about the Town or what's offered*

### WHY I interact with Midland



I mostly want to use / interact with available services



I am looking for informal, "one-off" services with a friendly demeanor

### WHAT matters to me most when interacting with Midland



Being aware of all the great things that Midland is doing & offers



Getting more advice, guidance & information beyond my specific service need



Connecting with the right person who can answer my questions & get what I need done



*“The Town of Midland is a fantastic getaway destination.*

*As a visitor to the area, I want to experience as much as the Town has to offer while here. Being able to easily get lots of information and do research makes planning the trip much easier.*

*Midland is relatively new to me which means I am not very familiar with the services available that I can take advantage. Because of this, its important that I can quickly access support that can answer my questions and even give me some advice or suggestions.*

*Whether I’m by myself or with others, having a friendly face I can count on goes a long way to making the most out of the trip.”*

# SERVICE INTERACTION

## HOW I interact with Midland



### I WANT TO...

|                                    | DAILY | WEEKLY | MONTHLY | ANNUALLY |
|------------------------------------|-------|--------|---------|----------|
| Get General Information / Support  |       |        | 1       |          |
| Apply / Get Approved for Something |       |        |         | 1        |
| Buy / Make a Payment for Something |       |        | 1       |          |
| Renew / Get Something Maintained   |       |        |         | 1        |
| Use / Interact with a Service      |       |        | 1       |          |



For my service needs, I typically have a quick phone call / email exchange before I get what I want done

MIDLAND PROFILE  
TEAM MEMBER



*"The Town of Midland is where I chose to be a member of the municipal team.*

*As a key public-service stakeholder, I'm passionate about making the Town a great place to live. Being able to improve and grow our service-experience as well as my professional development is a great opportunity.*

*Midland has numerous services that are available to the population and can span across the departments. Because of this, having a clear plan and known goals I can look to with ongoing communication helps simplify a lot of the complexity.*

*Setting myself and team up with the knowledge, skills and tools to effectively deliver services is extremely important to our continued success."*

# CHARACTERISTICS & INTERACTIONS

## WHO I am

### Departmental



*As an employee in my department, I'm familiar with the team & service-delivery processes*

### Interdepartmental



*As an employee working across departments, I'm outside my expertise-area to deliver on services*

### Council



*As an elected official. I am a key part of the population's "voice" & work with all employees*

## COLLEAGUE Interactions when Delivering Services



STRATEGY

Our "future" service vision can vary between depts. Causing confusion in what to prioritize



PROCESS

Different depts. / team members will complete activities differently causing confusion



TALENT

Customer Service excellence is a desire for most, helping to drive new / better ways of doing things



DIGITAL

Digital tools used internally cause challenges when collaborating with team members

## CUSTOMER Interactions when Delivering Services



STRATEGY

Customers generally enjoy when they can get planning updates and success stories



PROCESS

Helping customers through steps to complete services can often take up most of a day



TALENT

Clarifying "who" and "how" customers can contact for their needs is a frequent issue



DIGITAL

Completing tasks that customers should be able to self-serve has a major impact on time and effort





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Website: [www.myCSPN.com](http://www.myCSPN.com)



@myCSPN



CSPN – Customer Service Professionals Network



Customer Service Professionals Network