

Municipality of Lakeshore – Report to Council

Chief Administrative Officer

Digital Transformation and Cloud Services



To: Mayor & Members of Council

From: Michael Martin – Division Leader, Digital Transformation & Cloud Services
Jenna Smith – Team Leader, Public Service

Date: January 3, 2024

Subject: Customer Service Policy and Implementation

Recommendation

Approve Option 1 to support the draft Customer Service Policy in principle and direct Administration to bring back a report with a finalized Policy and a detailed procedure and further information on implementation through Customer Relationship Management & Service Management software and associated deployment costs, all as presented at the January 30, 2024 Council meeting.

Background

The Customer Service Policy establishes resident and stakeholder focused service standards that set the minimum acceptable service levels adopted by the Municipality of Lakeshore, ensuring prompt response and acknowledgement of resident, and stakeholder inquiries including a 5-business day response time.

Comments

The draft Customer Service Policy has been built based on best practices and research including other Municipalities and generally accepted industry best practices.

The following has been considered while creating our Customer Service Policy:

1) Fair and consistent treatment

- Ensure fair and consistent treatment in alignment with established policies and procedures.

2) Prompt response and acknowledgement

- This includes setting a reasonable expectation for service delivery by standardizing and enforcing a 5-business day response time as directed by Council.
- Maintaining continuous counter coverage during regular business hours

3) First Contact Resolution

- Resolving issues at first point of contact wherever possible
- Minimizing customer redirection by utilizing warm transfers

4) Enhanced communication

- Implementation of standardized greetings and adhering to out of office standards
- Provide direction and training on how to handle general complaints, escalations, and service disruptions.
- Communicating available channels of service through our website and social media

5) Managing Follow-Ups and Accountability

- Minimize the need for multiple follow-ups by enforcing accountability.
- Utilizing a customer relationship management software for effective enforcement, tracking and service quality measurement.

Administration recommends that Council support the draft Customer Service Policy, and have Administration return with a subsequent report with an implementation procedure in addition to the effort and costs required to implement a Customer Relationship Management and Service Management software.

Without these systems, Administration will not be able to log incoming inquiries, service requests, and work orders for all divisions. As a result, it will not be possible to produce accurate reports for Council or Administration to monitor ongoing service level achievement or identify cases that require further follow up and communication. Without this capability, the Customer Service Policy will only function as a guiding principal and adherence will be best effort.

By adding this technology, the Municipality will be able to log work across the municipality, regardless of work type, which will permit for ongoing tracking and follow ups aligned with the Customer Service Policy.

Implementing these systems will enable the Municipality to monitor key performance indicators and provide service level reporting data through our newly implemented data portal for Council. This approach aims to enhance transparency, allowing for more informed decision-making while ensuring we are achieving and continuing to improve the quality of our service.

Others Consulted

- The Accessibility Advisory Committee was consulted when drafting the Customer Service policy to ensure inclusion and consideration around accessibility. Due to the substantial length and importance of the content, it has been determined that the already existing Accessible Customer Service Policy will remain separate.

Options

Option One – recommended option

Support the draft Customer Service Policy in principle and direct Administration to bring back a report with a finalized Policy and a detailed procedure and further information on implementation through Customer Relationship Management & Service Management software and associated deployment costs.

Option 2

Approve the draft Customer Service Policy to establish guidelines on how the Municipality of Lakeshore will interact with the public without tracking and enforcement capabilities.

Financial Impacts

The financial impacts are not determined at this time and will depend on the options Council moves forward with.

Attachments

draft Customer Service Policy

Report Approval Details

Document Title:	Customer Service Standards Policy and Implementation.docx
Attachments:	- Customer Service Policy.docx
Final Approval Date:	Jan 25, 2024

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

Prepared by Michael Martin and Jenna Smith

Approved by Justin Rousseau and Truper McBride