



Schedule A to By-law 70-2024

Customer Service Policy

Policy # [C or A] - [DI] - 00000

Date Last Reviewed: Thursday, May 23, 2024

1.0 Purpose and Scope

- 1.1 The Municipality of Lakeshore is dedicated to providing exceptional customer service to its residents, visitors and stakeholders, with a focus on efficiency, consistency, and accessibility.
- 1.2 This policy aims to establish Customer Service Standards that can be expected when interacting with the Municipality of Lakeshore.
- 1.3 This policy focuses on essential drivers, such as:
 - 1.3.1 Prompt response and acknowledgement of customer inquiries.
 - 1.3.2 Fair and consistent treatment in accordance with policies and procedures
 - 1.3.3 Setting reasonable expectations for service delivery
 - 1.3.4 Resolving issues at first point of contact wherever possible.
 - 1.3.5 Minimizing customer redirection
 - 1.3.6 Managing the need for multiple follow-ups
 - 1.3.7 Enhancing communication with citizens and staff.
 - 1.3.8 Accessibility as it pertains to municipal services.
- 1.4 The Municipality of Lakeshore will promote quality customer service and accessibility through the development of policies, procedures and practices that also ensure consideration of people with disabilities.
- 1.5 All interactions with staff are expected to be respectful to comply with the Workplace Violence and Harassment Policy.
- 1.6 This policy shall apply to all employees, departments, divisions, and sections within the Municipality of Lakeshore.
- 1.7 This policy shall not apply during any period where the Municipality of Lakeshore has declared a "State of Emergency" as defined under the Emergency Management Act.



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2.0 Definitions

- 2.1 **“Abusive behaviour”** is displayed when customers shout, display extreme bullying behaviour, use abusive or obscene language or make personal threats. This includes in person, over the phone or in written forms such as email or letters.
- 2.2 **“Customers”** refer to any stakeholders including all staff; citizens and visitors to the Municipality; businesses; volunteers and agents recognized by the Municipality.
- 2.3 **“Feedback”** means an opinion, comment, or expression of interest with respect to a Municipal program or service.
- 2.4 **“Frivolous Complaint”** means a complaint about a minor or trivial matter or issue that is vague or so poorly explained that we cannot consider it meaningfully.
- 2.5 **“General Complaint”** when a customer expresses dissatisfaction with a situation related to the service provided by the Municipality of Lakeshore.
- 2.6 **“Municipal Act”** means the Municipal Act, 2001, S.O. 2001, c. 25.
- 2.7 **“Municipality”** means Municipality of Lakeshore
- 2.8 **“Person”** includes an individual, a corporation, a partnership or limited partnership, an association, legal entity, or an authorized representative thereof.
- 2.9 **“Person with Disabilities”** Person with disabilities is defined according to the “Accessibility for Ontarian with Disabilities Act, 2005.”
- 2.10 **“Public”** includes citizens, individuals who work, go to school, enjoy leisure activities, or travel through the Municipality of Lakeshore, property owners, businesses, charitable and community organizations and other



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stakeholders.

2.11 “Service Level Standard” sets the expectations between the service provider and the customer on the level of service provided.

2.12 “Warm Transfer” is when staff introduce the caller and provide the context to the person whom the call is being transferred to.

3.0 Policy

3.1 Interaction Response Time:

3.1.1 The Municipality will respond to customer inquiries promptly, aiming to provide an email or telephone correspondence within 5 business days.

3.1.2 Depending on the nature or complexity of the inquiry, the initial response may be an acknowledgement of receipt of the correspondence and an estimate of the time required for formal response.

3.1.3 This sets expectations for response timing and provides instructions on how to follow-up on the request in the future, if required.

3.2 Channels of Service

3.2.1 The public can access customer support through various channels, including phone lines, email and in-person assistance, to choose the most convenient option.

3.2.2 The details about available channels of service and hours are posted on the Municipality of Lakeshore’s website, www.lakeshore.ca.



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3.3 Out of Office Standard

3.3.1 Staff shall change their voicemail message if they are going to be away for one or more business day, including an alternate contact and return date.

3.3.2 Staff shall also use their email “Out of Office Assistant” if they are going to be away for one full day or more, aligning the message with the voicemail and including an alternate contact and return date.

3.4 Greeting

3.4.1 Staff will identify their department and first name when answering the phone.

3.4.2 Staff will greet customers in person at the earliest opportunity with a smile and the following phrase: “Hello, how may I help you?”

3.4.3 If staff are already on the phone with a customer and also responsible for in-person inquiries, staff shall inform the caller that they require a moment to acknowledge an in-person customer.

3.5 Warm Transfer

3.5.1 Staff shall utilize warm transfers when redirecting callers to other departments or employees.

3.5.2 When taking messages for another staff member, record as much information as possible about the nature of the request and include customer contact details.



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3.6 Counter Coverage

3.6.1 Staff must ensure customer service counters are monitored when staff step away momentarily.

3.6.2 All divisions must have plans to provide continuous customer service coverage during regular hours of operation.

3.7 Escalations

3.7.1 Staff will set limits and offer choice to the customer, informing them that verbal abuse will not be tolerated.

3.7.2 Staff are not expected to tolerate abusive behaviour.

3.7.3 If the customer continues to be verbally abusive, staff will report the behaviour to the appropriate leader to attempt to resolve the issue respectfully and contact the Ontario Provincial Police if necessary.

3.8 General Complaints

3.8.1 If a customer has a general complaint about the service the Municipality has provided:

3.8.1.1 An issue may be escalated and investigated by administration.

3.8.1.2 Customers can report complaints or concerns to the appropriate division by email, telephone, or by scheduling an in-person meeting.

3.8.1.3 If deemed appropriate, feedback regarding the provision of accessible services may be directed to the



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for recommendations.

3.8.1.4 If agreement on the resolution cannot be reached, the matter will be directed to the Corporate Leader for review and response.

3.9 Accessibility

3.9.1 Services provided will adhere to the requirements under the Accessibility for Ontarians with Disabilities Act.

3.10 Service Disruption

3.10.1 In case of planned temporary service disruptions affecting persons with disabilities, the Municipality will provide notice to the public, including the reason, duration, contact information and available alternatives.

3.10.2 Notice of the disruption will be posted on the premises and on the Municipality's website.

3.10.3 In the event of an unplanned service disruption, notice will be given as soon as possible.

3.11 Format of Documents

3.11.1 Documents will be provided in a format that accommodates accessibility.



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4.0 Community Outreach and Communication

- 4.1 The Municipality of Lakeshore is committed to outreach efforts to ensure that residents and customers are aware of the Municipality's services and how to access them. This will involve using various communication channels, such as social media, newsletters, and community events.
- 4.2 The Municipality of Lakeshore will provide information and resources to educate customers about the municipality's services, policies, and procedures. This can help set clear expectations and reduce misunderstandings.

5.0 Responsibilities

- 5.1 The CAO is responsible for the implementation and communication of costs associated with this policy.
- 5.2 Corporate Leaders are responsible to ensure staff are trained on and follow this policy.
- 5.3 It is the responsibility of the Division Leader – Client Service Delivery to deliver training, conduct quality assurance assessments and provide recommendations.
- 5.4 Staff are responsible for following this policy.

6.0 Consequences

- 6.1 Failure to follow this policy may result in violations in legislation.
- 6.2 Failure to follow this policy may result in discipline.

7.0 Reference Documents

- 7.1 Accessibility for Ontarian with Disabilities Act
- 7.2 Accessible Customer Service Best Practices and Procedures



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7.3 Workplace Violence and Harassment Policy and Procedure

7.4 Employee Code of Conduct

7.5 Feedback Form

7.6 Addressing Customer Feedback Form

7.7 Service Disruption Notice

8.0 Communication and Training

8.1 Training

8.1.1 The Municipality of Lakeshore shall ensure that all staff are trained on policies, practices and procedures establishing the quality and accessible services.

8.1.2 Training shall be mandatory for all new employees upon their initial orientation. In addition, all employees should receive refresher training every five years thereafter, as required or as necessary.

8.1.3 The training will include a review of the purposes of the “Accessibility for Ontarians with Disabilities Act (AODA)” and the requirements of this policy and instruction on how to interact and communicate with persons with various types of disabilities.

9.0 Review/Revisions

9.1 Reviews will occur annually, with the results and any necessary revisions documented.



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#	Date Revised	Author	Section	Details of Change
1				
2				
3				
4				

Refer policy questions to: Division Leader – Client Service Delivery