Municipality of Lakeshore – Report to Council

Chief Administrative Officer

Client Service Delivery

To:	Mayor & Members of Council
From:	Michael Martin, Chief Information Officer Jenna Smith, Division Leader - Client Services Delivery
Date:	May 22, 2024
Subject:	Customer Service Standard Implementation

Recommendation

Direct the Clerk to read By-law 70-2024, being a By-law to Adopt a Customer Service Standards Policy, during the Consideration of By-laws;

Direct Administration to expand the software and service scope of PSD Citywide as presented with costs of $208,000.00 including first year licensing and implementation; and

Pre-approve a Digital Transformation and Cloud Services operating budget increase of $75,000.00 in the Draft 2025 Budget; and

Pre-approve a Public Service Unit operating budget increase of $255,000.00 in the Draft 2026 Budget, all as presented during the June 25, 2024 Council meeting.

Strategic Objectives

3c) Modernizing and Enhancing Municipal Functions - Continue investment in modernized services, including the integration of current best practices and automation, by engaging in service transformation and process mapping

5a) Modernize Citizen-Centered Services - Conceiving/implementing a plan for resident-service standards (including establishing a response policy for all inquiries to the municipality, IT solutions/apps/portals, phone protocols, virtual enablement, etc)

5c) Modernize Citizen-Centered Services - Setting policy and standard operating procedures for resident communication and follow-ups

Background

A comprehensive Customer Service Policy has been developed to establish high quality resident-focused service standards that can be expected when interacting with the Municipality of Lakeshore, ensuring prompt response and acknowledgement of customer inquiries including a 5-day response time aligned with Council's strategic objectives.

Presented at the January 30, 2024 meeting, Council supported the draft policy and moved Option 1 which directed 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.

Comments

To effectively implement and track the Customer Service Policy, it is imperative to utilize suitable software solutions. Below is an outline of the recommended software requirements, which complement each other and create a holistic solution that is aligned with the objectives of the Customer Service Policy:

Asset Tracking, Work Orders, and Service Requests Software:

- Track incoming requests from residents, generating work orders, and assigning those work orders to staff or contractors.
- Tracks assets, resources, projects, and maintenance schedules as well as inspections and compliance monitoring.
- Mobile functionality.
- Citizen request portal.
- Accurate and Data-Rich Reporting.
- Route Patrol.
- Utilized for location or asset-based requests with GIS integration.

Back Office Requests Software:

- Some client inquiries and requests may require extended engagement and do not fit into the traditional service request or work order framework. This software will facilitate effective communication and tracking for such cases.
- These types of requests are not location based, but rather require interactive engagement, feedback, or research, therefore falling into the "other" category.
- Additionally, corporate service functions such as Finance, Legal, HR, IT and Communications may have services requested internally that are related to resident facing inquiry. Such demand should be tracked and subject to the same policy and procedure.

Knowledge Base and Documentation Software:

- To support business continuity and ensure quick access to accurate information, a robust knowledge base and documentation system is essential. This software will enable efficient documentation, knowledge sharing, and searchable access to information, ultimately driving first call resolution and timely responses.

Administration recommends that PSD Citywide is extended to support the needs of Asset Management, Work Orders, and Service Requests and Route Patrol. PSD Citywide is already in use by the municipality in relation to Asset Management. Adding additional functionality to this system will allow for end-to-end asset management and condition depreciation. With this data in hand, it will further our decision-making capabilities. PSD Citywide is robust municipal service management platform that encompasses Work Orders, Service Requests, Assets, Route Patrol, integration with GIS and a full citizen portal for self-service and inquiry tracking & communication.

PSD Citywide is prepared and able to provide a professional services engagement to deploy this software across the municipality in order to achieve a best practice state. It will be customized to our needs and include current and future service levels as set by Council. Priority will be given to resident facing services which will highlight the value of the adoption of the Customer Service Policy.

As a second phase, attention will be turned to back-office service onboarding to PSD Citywide and other complimentary software solutions that will support the remaining departments of the municipality to ensure all supporting functions and departments adhere to the same standard and reporting capabilities. A robust knowledgebase software solution will be deployed so that all Departments and Divisions will be able to document procedures to enable continuous review and improvement while addressing business continuity requirements.

As a final phase of delivery, a robust Dashboard will be developed to provide Administration and Council with transparent SLA achievement metrics enabling data-driven decisions.

Finally, it is recommended that Council pre-approve the permanent funding of the full Public Service Unit and Customer Service Representative staffing compliment in the Draft 2026 Budget and eliminate the COVID relief operating funds dependency at the cost of $255,000.00.

Financial Impacts

Item	Cost
Software Licensing	**$75,000.00**
Implementation	**$208,000.00**
Public Service Unit Full Time & Customer Service Part time conversion (removes dependency on COVID relief fund)	**$255,000.00**

It is recommended that $208,000 for implementation in 2024 be funded from the working funds reserve as the Technology and Office Equipment reserve does not have sufficient funding at this time.

Report Approval Details

Document Title:	Customer Service Standards - Implementation.docx
Attachments:	
Final Approval Date:	Jun 18, 2024

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

Prepared by Michael Martin and Jenna Smith

Approved by Truper McBride