



# The Corporation of the Town of Milton

Report To:	Council
From:	Andy Scott, Director, Strategic Initiatives & Business Development
Date:	November 15, 2021
Report No:	ES-008-21
Subject:	Town of Milton Customer Service Strategy
Recommendation:	<p><b>THAT the Customer Service Strategy as attached to ES-008-21 (Schedule A) be received for information;</b></p> <p><b>AND THAT staff report back in 2022 with a work plan including priorities and financial implications.</b></p>

## EXECUTIVE SUMMARY

- Council adopted the Town of Milton Council-Staff Work Plan in 2020, which created a shared vision for Council and staff.
- The Work Plan identified 2020-2023 Priorities including the creation of the Customer Service Strategy (CSS) in order to foster a strong customer service culture.
- In May of 2021, the Town began the process towards the establishment of the CSS, including significant consultation and input across the organization.
- Following a 10-Phase Work plan, the enclosed CSS provides overarching customer service goals for the Town of Milton in order to create consistently high-quality customer experiences, as demonstrated through regular collection, analysis, and reporting of customer satisfaction data.
- The guiding vision for the Milton CSS is to be customer-focused, empowered, evidence-based and technology driven.
- The CSS provides 18 recommendations across six categories. Staff will be reporting back in 2022 with a detailed implementation workplan, as well as the preferred implementation options.

## REPORT

### Background

The Town's Council-Staff Work Plan was approved in 2020 through report ES-009-20, and identified a customer service strategy as part of the Town's Service Innovation theme. Boulevard Strategy Group was retained by the Town in 2021 in order to prepare the CSS.

## Background

A ten stage methodology was developed by the consultant in conjunction with a Town advisory working group. The methodology was designed to capture knowledge of best practices and emerging trends, as well as generate organizational quantitative and qualitative analysis from which the strategy would be developed and refined.

Strategy specific client/community engagement was considered, but given the volume of unique services provided by the Town, the modifying impacts COVID-19 has had on service delivery modalities and the volume of feedback received via community consultations pre-pandemic. It was determined that community engagement for the purposes of informing and optimizing customer service was best suited to when there is an element of service delivery normalization.

A detailed breakdown of the 10 phased approach is contained within the body of the Schedule A, attached.

## Discussion

The following summarizes key findings and observations that are included in the CSS report. The full report is also available as an appendix to this staff report.

### Setting the stage

Many public sector organizations began implementing and incorporating private sector customer service advancements prior to the COVID-19 pandemic. But the pandemic's impact on service delivery has further expedited modifications and enhancements to have a greater focus on self-service and online accessibility.

But customer service is more than efficient service transactions and increasing the number of modalities offered. This approach needs to be underpinned by a culture of being a customer focused organization, with each team member understanding that positive customer service is central to the organization's values. This is of even greater importance in the municipal sector where for many transactions, a citizen cannot engage with another service provider because one does not exist.

### Environmental Scan - trends and best practices

Traditional, decentralized and department-based methods of providing customer service are being replaced with service delivery models focused on coordinating services around the customer perspective.

Organizational charts are no longer being relied on to frame customer needs but, rather, centralized intake centres are being established, consolidating intake processes for a variety of municipal services on an enterprise-wide basis into service centres or 311 centres.

## Discussion

Client centred models can be labour intensive, therefore they are frequently underpinned by technology solutions which:

- Ensure centralized intake teams have access to a broad range of accurate information (typically referred to a Customer Service Knowledge Base) to respond to the majority of inquiries.
- Act as an inquiry management system ensuring the intake team can monitor the status of any inquiry.
- Allow for inquiries that require additional support beyond the capacity of central intake to be transferred seamlessly to other parts of the organization.
- Begin to generate data to support performance management, service standards and analysis to support evidence informed decision making.

Many municipalities which are implementing central intake teams are utilizing existing technology solutions to achieve these needs depending on the existing technology already in place and the degree of integration available.

Trending across large municipalities and medium to large scale private sector organizations demonstrates movement beyond this phase to single consolidated software solutions which combine these separate technologies under one solution. These consolidated software solutions are called Customer Relationship Management (CRM).

A further emerging trend is the adoption of online self-serve options where clients interact with technology to resolve their own inquiry. Technology already exists whereby Artificial Intelligence (AI) systems can interact with a client, review client records and offer tailored solutions.

At the heart of almost all customer focused models explored in both the public and private sector is the premise that customer service is entrenched corporate-wide through embedding a culture of customer service across the organization. This is done typically through alignment with organizational values.

Across the private sector, there is a strong focus on continued customer engagement, building and maintaining brand trust and loyalty. While this approach might not be applicable to every municipality, for a growing municipality targeting the attraction of new residents, visitors and businesses, this approach may be an important consideration for the future.



## Discussion

### Milton Context and the Results of the Internal Consultation

Between May and August, over 100 staff members across the corporation were engaged including front-line staff and management. The engagements were tailored to ensure that they were relevant to the audience and maximized feedback and participation. Some of the most valuable feedback was received from the town's employees who engage in direct service provision to clients/residents.

While these engagements provided key insights and identified areas for improvement, they also highlighted the dedication of the Town's staff to customer service and their commitment to the provision of high quality, expedient customer service, and the dedication to the satisfaction of our residents and customers.

Consultations with Members of Town Council echoed this sentiment, noting their high regard for Town employees. Councillors clearly articulated the high degree of responsiveness that individual staff members demonstrate when following up and following through on constituent requests.

A review of the existing technologies used by the Town found a number of software solutions in use across the various business units. The use of the solutions varied from team to team. Further potential remains to optimize existing tools and resources to achieve progress towards the best practices described earlier in this report.

The Town is utilizing a CRM solution within the Economic Development Division, and work continues to optimize its use and evaluate its value and scalability through a corporate lens.

When considering the findings of the internal analysis undertaken, and applying the trend and best practice analysis. The following overarching themes emerged as areas for future focus and improvement. These themes have been developed into a compelling desired future state which can act as a measure of future success.

<b>Current State:</b>	<b>Desired Future State:</b>
Customer service seen as a short-term corporate priority.	Entrenched culture of customer service, supported by vision, mission and values.
Prioritizing service resolution over data entry.	Prioritize both service resolution and systematic tracking and monitoring against approved standards.
Many doors into the organization.	Fewer, streamlined doors that are equipped to assist customers on a range of frequently accessed Town services.
Finding the right person.	Empowering frontline employees to assist and resolve when possible.



## Discussion

Manual processes.	Automated processes.
Separate software solutions and platforms.	Integrated software solutions and platforms.
Council as concierges.	Council as partners.

### Recommendations:

The following are 18 general recommendations under six categories for the Town of Milton.

Category	Recommendations
Building the Foundation	<ol style="list-style-type: none"> <li>1. Build a culture of customer service - starting with vision, mission, and values as the foundation.</li> <li>2. Determine a priority framework - start with residents; integration based on volumes.</li> <li>3. Create and communicate customer service standards.</li> <li>4. Monitor resources associated with service levels</li> </ol>
Creating Capacity for Evidence-based Approaches	<ol style="list-style-type: none"> <li>1. Administer a public satisfaction assessment program.</li> <li>2. Enable systematic data collection and performance measurement.</li> </ol>
Establishing Smart Processes	<ol style="list-style-type: none"> <li>1. Streamline service intakes.</li> <li>2. Prioritize automation over manual processes.</li> <li>3. Transition to a “digital first” approach while addressing barriers to access.</li> <li>4. Complete customer journey mapping prior to integration.</li> <li>5. Address after-hours service issues.</li> </ol>
Supporting People	<ol style="list-style-type: none"> <li>1. Professionalize customer service roles.</li> <li>2. Build a central knowledge bank with high employee access.</li> <li>3. Support strong internal service to enable exceptional external customer service.</li> <li>4. Provide dedicated project management and change management.</li> </ol>
Enhancing an Open for Business Environment	<ol style="list-style-type: none"> <li>1. Focus on process maps to serve other customer types: business, industry, development, real estate, contractors.</li> </ol>

**Discussion**

	2. Establish service level agreements with commenting agencies and regulatory authorities.
Strengthening Governance	1. Position Members of Council as partners.

**Implementation Options and Next Steps**

When considering adoption of the recommendations set forth, each varies in its degree of effort and impact. It's important that other projects, initiatives and strategies occurring across the Town are also considered. In some instances, projects and initiatives already underway will help support the achievement of these recommendations and should be leveraged to avoid duplication of effort. Good examples are the implementation of PerfectMind software to allow for self-service online bookings of recreation activities, and the ability to leverage the Towns website to generate service requests (<https://www.milton.ca/en/living-in-milton/report-a-problem.aspx>).

Initially focusing on building a culture of customer service, and further enabling the systematic collection of data using existing software solutions would be an optimal launching point as the Town begins to transition towards the desired future state. This work is foundational to future success.

By focusing on these as deliverables beginning in 2022, staff can demonstrate progress and look to leverage opportunities as they arise while also developing future plans to implement the more resource intensive recommendations contained within the strategy.

It also allows for the assessment of existing technologies, their scalability and interoperability, while also considering when might an enterprise wide customer service software solution be necessary in the future.

It is recommended that staff develop and report back to Council a multi-year work plan with anticipated future costing which supports the Towns transition from our current state to the desired future state as identified within the Customer Service Strategy.

Further, that staff leverage the recently launched IT Strategic Planning process to assess our existing customer service technology/software solutions, determining their level of scalability & interoperability.



### Financial Impact

The development of a multi-year work plan that prioritizes the deliverables outlined within the Customer Service Strategy will be prepared and presented to Council prior to implementation. This timing will allow for alignment with the on-going IT strategic plan, and will include cost estimates for the resources and investments that will be required for the various initiatives. Funding strategies can be addressed at that time with budget approval in accordance with the Town's Budget Management Policy (Policy No. 113).

Respectfully submitted,

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Director, Strategic Initiatives & Business Development

For questions, please contact:  
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### Attachments

Schedule A- Milton Customer Service Strategy

CAO Approval  
Andrew M. Siltala  
Chief Administrative Officer

### Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the HuronWendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.







Town of Milton

## Customer Service Strategy

Final Report

October 2021

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# 1.0 Introduction and Executive Summary

The development of a Customer Service Strategy is identified as a priority within the Town of Milton's Council-Staff Work Plan, 2020-2023.

In May 2021, the Town engaged the services of Boulevard Strategy Group to work with a project team and employees across the organization on the development of a Customer Service Strategy. The project involved the following objectives:

- Create positive customer experiences.
- Work smarter when it comes to customer service practices.
- Strengthen a corporate-wide lens, continuing to break down silos between departments and divisions.
- Set the stage for a potential Customer Relationship Management (CRM) solution, consistent with recommendations from recent service delivery reviews.

The project involved 10 phases, including research and robust consultation with Members of Council, organizational leaders, and employees.

## 1.1. Key Findings and Organizational Needs

Key findings from this process included the following organizational needs:

- Customer service initiatives should be built on a corporate-wide culture of service.
- There are opportunities for greater evidence-based decision-making through systematic data collection, tracking, and monitoring against approved standards and service levels.
- Fewer, more streamlined customer access points that are equipped to handle the most requested services will increase the probability of first contact service resolution and reduce duplication in service requests.
- Empowering frontline employees to assist with service delivery will increase the probability of first contact service resolution and reduce the need for escalation in resolving service requests.
- Greater automation in customer service processes and greater integration in software solutions will, once implemented, reduce the level of effort involved in manual tracking, data entry, and analysis.
- Strong partnerships with Council are important to the Town's customer service delivery, including providing objective information for evidence-based decisions, and ensuring Councillors are supported in fulfilling their obligations to constituents.

## 1.2. Guiding Principles and Goals

To address these needs, this report proposes the following guiding principles and overarching goals for the Town of Milton's customer service:

- **Customer-Focused** – The design, organization, and implementation of customer service frameworks, channels, and processes prioritize customer experience.
- **Empowered** – Customers are empowered with self-serve options and frontline employees are empowered with the tools and information they require to provide exceptional service.
- **Evidence-based** – Decisions are made according to objective information, based on tracking and monitoring against established standards.
- **Technology-Driven** – Strong customer service processes are consistently and efficiently applied through automation and platform integration.

The proposed overarching customer service goals for the Town of Milton are:

- Create consistently high-quality customer experiences, as demonstrated through regular collection, analysis, and reporting of customer satisfaction data.
- Achieve a 60 per cent first contact service resolution rate by 2026.

## 1.3. General Recommendations

To advance the guiding principles and overarching goals, this report makes 18 recommendations across six categories:

1. Build the Foundation
  - Build a culture of service.
  - Determine a priority framework.
  - Create and communicate customer service standards.
  - Monitor resources associated with service levels.
2. Create Capacity for Evidence-Based Approaches
  - Administer a customer satisfaction assessment program.
  - Enable systematic data collection and performance measurement.
3. Establish Smart Processes
  - Streamline service intakes.
  - Prioritize automation over manual processes.
  - Transition to a “digital first” approach while addressing barriers to access.

- Complete customer journey mapping.
  - Address after-hours service issues.
4. Support Employees
- Professionalize customer service roles.
  - Build a central knowledge bank with high employee access.
  - Support strong internal customer service to enable exceptional external customer service.
  - Provide dedicated project management and change management.
5. Enhance an “Open for Business” Environment
- Focus on customer journey mapping for business-oriented customers.
  - Establish service level agreements with commenting agencies and regulatory authorities.
6. Strengthen Governance
- Position Members of Council as partners in customer service.

## 1.4. Implementation Options

Depending on current resource limitations and corporate appetite for change, there are different implementation options that the Town might consider as the organization works through the general recommendations presented in this report.

Three options are presented below for the Town’s consideration:

1. Prioritize tracking and monitoring across Town services.
2. Implement a CRM solution and service level analysis in priority customer-facing divisions only.
3. Proceed with an integrated enterprise-wide approach.

Further details on the methodology, research, consultation, guiding principles and goals, general recommendations, and implementation options are provided in this report.

## 2.0 Methodology

The Town of Milton Customer Service Strategy involved a 10-phase work plan that began in May 2021 and concluded in November 2021. Each of the ten phases are described below.

### Phase 1 – Project Launch

- Phase 1 included refining the project scope, project launch meetings with the Leadership Management Team and Strategic Management Team, and project launch messages to Members of Council and Town employees.

### Phase 2 – Trends and Best Practices

- Phase 2 identified current trends and best practices in customer service. The research involved comparable municipalities with recent customer service initiatives and an overview of additional trends in the private sector.

### Phase 3 – Town of Milton Service Context

- Phase 3 identified customer service considerations that are specific to the Town of Milton through review of local demographic information, website analytics, 2021 municipal budget, organizational charts, job descriptions, recent service delivery reviews, and other relevant information.

### Phase 4 – Departmental Consultations and Service Transactions

- Phase 4 involved five virtual focus groups with leaders from Town of Milton operating departments. The focus groups sought input on current customer service delivery challenges and opportunities and further context and validation for Town of Milton service transactions.

### Phase 5 – Council Perspectives

- Phase 5 involved individual telephone interviews with every Member of Council to obtain insights into what is working well and opportunities for improvement. Conversations also sought to understand views on the appropriate role for Members of Council in customer service delivery.

### Phase 6 – Key Informant Interviews

- Phase 6 involved interviews with strategic advisors for the project. Advisors were selected in collaboration with Town management by identifying leaders involved in enabling customer service on a corporate-wide basis. Representatives included leaders from Information Technology, Strategic Communications, Strategic Initiatives, and Community Services (Recreation and Culture).



### **Phase 7 – Service Scenarios**

- Phase 7 leveraged the information obtained in previous phases to develop fictional service scenarios as the basis for collaborative problem-solving in Phase 8.

### **Phase 8 – Workshops with Customer Service Employees**

- Phase 8 involved four virtual workshops with frontline employees who interact directly with the Town's customers. The objectives of the workshops were to understand the experiences of employees and obtain their ideas on how the Town could support or enhance their ability to provide exceptional customer experiences.

### **Phase 9 – Analysis and Recommendations**

- In Phase 9, information collected in all phases was summarized and analyzed to develop guiding principles, customer service goals, general recommendations, and implementation options for the Town's consideration.

### **Phase 10 – Submission and Presentation**

- In Phase 10, a draft report was submitted and presented to the Town's Leadership Management Team and Strategic Management Team. The report will be revised and finalized based on management feedback and will be presented to Town Council for consideration and approval in November 2021.

## 3.0 Trends and Best Practices

The project included a scan of recent trends and potential best practices that the Town of Milton may wish to consider in its Customer Service Strategy.

### 3.1. Recent Municipal Examples and Trends

The scope of work for the Town of Milton Customer Service Strategy project involved review of recent customer service developments in the Ontario municipal sector. This review included:

- Town of Whitby Customer Service Strategy (2021)
- City of Mississauga Customer Service Strategy (2017)
- City of Burlington Customer Experience (CX) Vision, Strategy, and Implementation Plan (2021)
- City of Greater Sudbury Customer Service Strategy (2019)
- City of Kitchener Comprehensive Customer Service Review (2019)
- Town of Caledon Service Excellence Strategy (2017)
- Town of Oakville service standards and related policies

Based on this review, key themes related to municipal customer service include:

#### 3.1.1. Customer-Centric Organization

Traditionally, municipal customer service approaches have been decentralized, with ownership for customer experiences delegated at a divisional level. While municipal divisional leaders are often committed to providing positive customer experiences within their portfolios, customer needs regularly extend beyond individual divisions.

Municipalities are increasingly reorganizing their information and service offerings from the customer perspective, presenting information and service options according to customer needs rather than organizational charts. This practice is particularly widespread when it comes to presenting service information digitally on municipal websites, applications, and social media accounts.

#### 3.1.2. Centralized Intake Centres and Corporate-Wide Integration

Beyond reorganizing digital information from the perspective of the customer, Ontario municipalities are increasingly integrating the intake process for a variety of municipal services on an enterprise-wide basis, offering one-window shopping for residents and businesses. Often termed “customer service centres” or “311 centres”, customers can access municipal services on a corporate-wide basis using centralized customer service counters and call centres.

Customer service representatives in these centres are equipped with access to a knowledge base to respond to customer inquiries and have access to departmental payment and workflow management systems.

Enterprise-wide CRM systems help municipal representatives address customer information and service transaction needs on the first interaction.

### 3.1.3. Customer Relationship Management

Through tools and technologies like CRM systems, municipalities are streamlining and automating service delivery, resulting in efficiencies for the organization and more responsive experiences for the customer.

CRM systems provide the following potential benefits:

- Centralized access to the status of current and completed customer requests, minimizing the level of effort involved in tracking down requests and building trust with customers.
- Alerts, notifications, and reminders that help to ensure requests are progressing toward resolution and the municipality is meeting its service standards.
- Systems integration and automation with existing workflow management, payment, and registration systems.
- Consolidated reporting and analytics to help the municipality identify opportunities for improvement and celebrate shared progress toward customer service goals.

### 3.1.4. Omni-Channel Service Delivery

Some municipalities, such as the City of Windsor, are moving toward an omni-channel service delivery infrastructure that allows customers to choose the channels that work best for them, whether in-person, by phone, online self-service, or smartphone applications.

In other municipalities some business lines, such as transit services, are also piloting integrated customer service access through social media, allowing customers real time access to customer service representatives and information through social media platforms.

Omni-channel service delivery goes beyond introducing municipal apps and onboarding services online. It involves enterprise-wide, systems thinking to ensure there is equity and consistency in service experiences, regardless of the service customers are accessing or the service delivery channel they select.

### 3.1.5. Culture of Service

Effective municipal customer service relies on ownership and buy-in from employees in all departments and at every organizational level.

- Senior decision-makers are responsible for approving investments and organizational realignment to enable effective service.
- Front-line representatives are responsible for customer experiences at the individual level.
- Operating departments are responsible for responsive follow-up on customer requests, and
- Shared service teams are responsible for implementing internal systems and processes.

As a result, it is important that customer service is entrenched in the corporate values and culture of the organization and includes:

- Supporting employees through organizational change, with an intentional, robust change management program.
- Hiring and rewarding employees based on customer service competencies.
- Communicating clear expectations through service standards and policies.

## 3.2. Private Sector Trends

Some municipalities report that citizen expectations for customer service have increased over the past decade. Several factors are driving these expectations, such as community growth, increased access to technology and migration between municipalities. However, residents are not often comparing their municipal service experiences to other public sector organizations, but to the private sector businesses they interact with on a regular basis.

In the private sector, organizations rely on exceptional customer service as a sales tool – building engaged customers and strong loyalty – to strengthen competitiveness and the profitability of their business. As a result, citizens have become accustomed to rapid response and delivery times, streamlined logistics, 24/7 access to the status of their requests, and multiple opportunities to provide feedback about their experience.

### 3.2.1. Customer Experience Tracking

Customer service tracking involves a high degree of data collection on an organization-wide basis and a strong commitment to using data to drive continuous improvement.

Quantitative data is collected in the form of resolution response times, time on the phone, customer support abandonment rates (for example, dropped calls), number of times a customer issue is forwarded or escalated, and number of times a customer issue is resolved at first contact.

Many private sector organizations also have a systematic approach to collecting qualitative feedback from customers, with positive comments regarded as opportunities to strengthen brand and customer loyalty, and negative comments as an opportunity to engage and drive continuous improvement. Tactics such as surveys, post-experience feedback, polls and online reviews are examples of qualitative feedback tools. Increasingly, there is an expectation for transparency from customers, and that both positive and negative feedback will be shared openly to build trust in products and services.

Social listening is an additional tool to collect qualitative feedback, whereby organizations monitor service experiences that customers share both on corporate social media accounts and accounts that are external to the organization.

### 3.2.2. Integrated Platforms

Organizations that can offer responsive customer service are those with integrated platforms, applications, workflow management, e-commerce solutions and service delivery channels. The larger an organization, the greater the potential for service fragmentation and the more critical integration becomes.

### 3.2.3. No More “Complaints Departments”

In the past, customer service may have focused on expedient resolution of customer issues, concerns, or complaints. While resolving issues to the satisfaction of the customer remains important in both public and private sector organizations, customer service now goes beyond reacting to issues to building in processes and systems to proactively ensure exceptional customer experiences, strengthening connections, engagement, and brand loyalty.

## 3.3. Post-Pandemic Predictions for Customer Service

The global COVID-19 pandemic is also influencing citizen expectations related to municipal customer service. Many municipalities have significantly transformed their service delivery to adapt to changes, including transitioning to virtual services, adapting service delivery to meet ongoing changes in public health regulations and maintaining open, transparent government.

While the long-term implications of the COVID-19 pandemic on municipal service delivery are not yet known for certain, the following predictions have been provided based on current trends.

### 3.3.1. Increased Use of Digital Service Channels

Since the onset of the global COVID-19 pandemic in March 2020, organizations in both the public and private sectors have developed alternative service delivery solutions to maintain business operations while respecting public health regulations. Often, this has meant transitioning services and products online, or strengthening existing online offerings. As a result, customers have had more digital service options, and are increasingly accessing services digitally out of convenience or necessity.

While uptake of digital services has increased during the pandemic, it is important to acknowledge that there are barriers to digital access that must be considered.

Depending on community demographics there may be barriers to digital access when it comes to literacy and affordability. It is also important to understand the availability, reliability, and affordability of high-speed internet within a community prior to increasing reliance on digital channels and offering alternative access for customers who may face barriers to digital access.

### 3.3.2. Inclusion and Diversity

During the pandemic and beyond, inclusion and diversity continue to be key drivers for services in both government and private sector organizations. For municipalities, inclusive service delivery includes, but is not limited to, the following considerations:

- Translation services when there are significant portions of the community where knowledge of Canada's official languages is limited.
- Cultural sensitivity training and bias awareness to effectively serve Black, Indigenous and People of Colour (BIPOC) communities.
- Awareness, training and understanding of unique service needs required by 2SLGBTQIA+ (Two Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Androgynous and Asexual) communities.
- Meeting and exceeding requirements for accessible service as defined by the *Accessibility for Ontarians with a Disability Act*.
- Ensuring service delivery decisions are consistent with municipal commitments to Age Friendly communities.
- Training related to mental health barriers in customer service delivery.

## 4.0 Town of Milton Service Context

To understand customer service delivery considerations that are specific to the Town of Milton, the project involved review of demographic information, Town services, 2021 budget, service delivery reviews, and organizational charts. Considerations for the Town of Milton are included below.

### 4.1. Demographic Overview

The most recent Census profile (2016)<sup>1</sup> for the Town of Milton was reviewed to obtain a better understanding of Milton residents, who comprise a large proportion of the Town's customer base.

#### 4.1.1. About Milton Residents

Based on 2016 Census data, Milton's population was 110,128 in 2016.<sup>2</sup> There are 35,537 dwellings in Milton.

Milton's population is younger when compared to the rest of the province. The average age in Milton is 34.3, compared to 41.0 for all of Ontario. The median age in Milton is 35.3, compared to 41.3 for all of Ontario.

Milton has a high proportion of children, with 28,405 residents under 15 years of age. The working age population of 15 to 64 years is 71,580, with 30,555 residents between 20 and 39 years of age and 34,650 between 40 and 64 years of age. The seniors' population of 65 years of age or older is 10,145.

The average total (before tax) household income in Milton is \$120,157, which is considerably higher than the provincial average of \$97,856. For the population over 15 years of age (n=80,555), 51,270 have a post-secondary diploma or degree, with 28,185 of these residents holding a university degree at a bachelor's level or higher. Comparatively, 9,640 have no diploma or degree and 19,650 hold a secondary school diploma or equivalent as their highest educational attainment.

Many Milton residents have lengthy commutes to work. The number of residents who travel between 15 and 29 minutes to work is 11,020, while 13,915 residents travel 30 to 44 minutes to work, 7,355 residents travel 45 to 59 minutes to work and 9,635 travel an hour or more.

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<sup>1</sup> Given high rates of growth and rapid changes to Milton demographics since the 2016 Census, it is recommended that this information be updated as soon as 2021 Census Community Profile data becomes available.

<sup>2</sup> Milton continues to experience rapid growth. Based on 2011 Halton Region Planning Estimates, Milton's population was projected to be 145,000 in 2021 and is expected to grow to 235,000 by 2031.

Within Milton's population, 1,040 people identify as Indigenous. There are 46,615 residents who identify as a visible minority according to Statistics Canada definitions, 22,895 of whom are South Asian.

Most Milton residents have knowledge of one or more of Canada's official languages, with 98,830 knowing English only, 8,745 knowing both English and French, and 115 knowing French only. The number of residents who are unfamiliar with English and French is 1,695. However, only 67,880 of Milton residents, or 62 per cent, identify English as their mother tongue. The top non-English mother tongue languages are Urdu (8,180), Arabic (2,915), Spanish (2,605), Punjabi (2,055) and Polish (2,055).

Given Milton's high levels of growth, the Town has more newcomers than other areas of the province. Some of these newcomers arrive from other areas of the province while others arrive from different parts of the world. Based on 2016 statistics, 8,370 individuals arrived in Milton within the past year and 31,220 arrived within the past five years.

#### 4.1.2. Service Delivery Considerations

Milton's demographic information suggests several municipal customer service considerations, including:

- **Transitioning to Digital Services** – Relative to other municipalities in Ontario, Milton is younger and more educated, and high-speed broadband is available to a large proportion of residents. This information suggests that the Town of Milton is a strong candidate for digital service offerings, as barriers such as digital literacy and access may be comparatively lower than other municipalities.
- **Ease of Access for New Residents** – Because of Milton's rapid growth, which is projected to continue, a large proportion of residents are new to the Town, with some new residents coming from elsewhere in Ontario and others coming from different parts of the world. As a result, accessing municipal services should be as straightforward as possible for people who are unfamiliar with Milton, including the geography of the Town and the division of services among departments and other levels of government.
- **Serving Customers in Multiple Languages** – Based on 2016 statistics, most Milton residents (98 per cent) are familiar with English and translating services may not be necessary from a functional access perspective. However, it is important to note that only 62 per cent of residents identify English as their mother tongue, and translation may help the Town demonstrate its commitment to supporting and celebrating diversity in Milton.



- **Hours of Operation** – Given the proportion of residents who spend considerable amounts of time in their day commuting to and from work, accessing Town services at a counter or by phone during regular business hours (or even slightly extended business hours) may not be practical. The Town can make accessing services easier by offering service access later in the evening and on weekends, and/or expanding the capacity for residents to self-serve anytime using online platforms.

## 4.2. Overview of Town Services

The 2021 operating budget, organizational charts, and recent service delivery reviews were consulted to obtain a clear picture of service transactions offered by the Town of Milton. This information was validated in consultation with departmental leaders, and the final list is included in Appendix 1, [Overview of Town Service Transactions](#).

### 4.2.1. Service Transactions

A list of service transactions offered by the Town of Milton was developed in consultation with departmental leaders. This phase of the project identified 179 transaction types across 31 divisions or business lines.

Most workflows for these transactions rely on manual processes to complete a customer request. Where workflows are automated, some divisions are using software platforms such as AMANDA and PerfectMind (Recreation and Culture).

A list of business lines and service transaction types is provided in Appendix 1, [Overview of Town Service Transactions](#).

### 4.2.2. Information Requests

In addition to service transactions, the Town serves customers by providing information. These types of service requests do not normally require work order initiation and, when questions are commonly asked or are straightforward in nature, responses are usually provided on first contact or on the same day.

The types of requests for information are numerous and vary widely. Providing a detailed inventory of information requests was not included as part of this project, however, review of the Town's website analytics since 2019 demonstrates that information related to recreation, rentals and reservations, parks and open space, snow removal, forestry, by-law and parking enforcement, taxation, permits, conventional transit, facilities, burn permits, home safety inspections, site selection and employment opportunities are most frequently accessed by visitors to the website.

### 4.2.3. Customer Access Points

Town customers can access services in a variety of ways:

#### In-Person<sup>3</sup>

- **Town Hall** – There are a variety of customer service counters specific to business lines located in Town Hall, as well as a corporate reception desk to assist customers in finding the correct location. In addition, the Mayor’s Office has an open-door policy for appointments.
- **Community Centres** – Milton Sports Centre, Milton Leisure Centre and Sherwood Community Centre have customer service desks to assist customers within those facilities and broader recreation, arts and culture programs and services.
- **Mattamy National Cycling Centre** – Employees are available to assist with memberships, drop-ins and passes, reservations and rentals at the facility.
- **First Ontario Arts Centre** – Employees at the box office assist with ticket sales and other arts and culture information and transactions.

#### By Phone

The Town advertises 40 separate phone numbers and/or extensions that are designated by division, facility, or type of service. The Town’s main phone number provides callers with an automated menu to direct their call, or an option to leave a voicemail in the Town’s general mailbox. Messages left in the general mailbox will be directed to the correct service area on the next business day.

For urgent Town-related requests outside of regular business hours (8:30 a.m. to 4:30 p.m.), Fire Services communications provides an after-hours call service (see the [After-Hours Service](#), Section 5.3.7 for further information on after-hours response). Some Town services, such as transit, leverage third party call centres for after-hours service on weekdays and Saturdays.

#### Town Website

The website provides information on all Town services and allows customers the opportunity to initiate over 100 types of service transactions.

The level of integration offered for services initiated on the website varies, ranging from full integration of parking ticket payment and program registration, to forms that transmit emails to relevant staff through form building, to downloadable forms that need to be manually completed and emailed or mailed by customers.

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<sup>3</sup> Availability of in-person service delivery has been limited by public health regulations associated with the COVID-19 pandemic.

## By Email

The Town of Milton website offers 38 fillable forms that transmit customer requests to a series of decentralized general email inboxes coinciding with the division responsible for the service.<sup>4</sup>

### 4.2.4. Customer Service through Third Party Providers

It should be noted that in some instances the Town leverages contracted third party providers to implement customer services. Milton Transit has two third party customer service call centres that operate both during regular business hours and after-hours and on Saturdays to meet legislated accessibility requirements. Other services, such as municipal by-law, are also considering third party contracts.

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<sup>4</sup> Employees reported increasing backlogs in general voice mailboxes due to service delivery changes during the COVID-19 pandemic.

## 5.0 Internal Consultations

This section reports key themes from consultations with the following internal stakeholders:

- Members of Town Council
- Departmental Leaders
- Project Strategic Advisors
- Employees in Customer Service Roles

### 5.1. Members of Town Council

Through individual telephone interviews in July 2021, every Member of Council provided feedback on the Town of Milton approach to customer service. These interviews covered: Council interactions with constituents, what is working well, where improvement is necessary, and perceptions of the appropriate role for Members of Council in customer service delivery.

Key themes that arose during these conversations are summarized below.

#### 5.1.1. Trust in the Town's People, Less Trust in Processes

Members of Town Council have high regard for Town employees. In their interactions with Commissioners and Directors, Councillors have built strong relationships based on trust and mutual respect. Councillors appreciate the high degree of responsiveness that individual staff members demonstrate when following up and following through on constituent requests.

Members of Council have less trust in the Town's customer service processes. Often, when Members receive a constituent request, it is because the constituent is having trouble navigating these processes. Councillors are reluctant to redirect constituents back to these channels because the Councillors do not have confidence that the request will be acknowledged or resolved to the satisfaction of the resident.

#### 5.1.2. Limited Staff Resources

Several Members of Council feel that the Town has insufficient staff resources to meet citizen expectations for customer service. These Councillors perceive that staff resources are spread thin, and the Town cannot take on more without investments in additional employees. These Councillors expressed concern that they lack the information necessary to make evidence-based decisions on the investments that are required, and that much of the information they currently receive is anecdotal.

It should be noted this perspective is not universally shared by Members of Council (see [Service Levels](#), Section 5.1.4).

### 5.1.3. Opportunities for Automation

Several Councillors advocated for increased automation of Town processes to mitigate pressures on limited staff resources. Those who support automation recognized the following benefits:

- Improved ability for residents to self-serve through online channels at a time and location that is most convenient for them.
- Increased communication with residents through automatic notifications on the status of requests.
- Ability for residents to track their requests and provide clear indications on the timeline for resolutions.
- Access to data and reports to inform decisions and investments at the divisional, departmental, Strategic Management Team and Council level.

Several Councillors expressed a desire for access to automated platforms so they can check the status of work orders on behalf of constituents, provide timely information to residents, and reduce the burden on staff for investigating and following up on requests.

### 5.1.4. Service Levels

Beyond automating processes and streamlining customer service intakes, some Councillors expressed concern that operational resources required to resolve service requests in a timely manner are insufficient. Whether increasing by-law officers or operations staff, some Councillors expressed that current customer service issues go beyond online self-service and ticket tracking and require a systems-level approach that ensures the Town has the capacity to follow through on work orders within a reasonable time frame.

Councillors may be open to further investments but expressed concern that the Town lacks capacity to generate reports to track performance against service standards. In some cases, established service standards are absent and responsiveness is contingent on capacity.

Several Councillors indicated that, if reporting was available, it would provide them with the information they require to make evidence-based investments in additional resources.

It should be noted that some Councillors feel that existing service levels are sufficient and cautioned against increased staffing levels. These Councillors feel that most residents are satisfied with current service levels and do not want tax increases that accompany additional, ongoing expenditures related to salaries or other sustained operational requirements. These Councillors believe that Council and staff should be working together to manage increasing expectations from residents, rather than raising service levels to meet unsustainable expectations.

### 5.1.5. Evaluating Processes Based on Customer Experience

Beyond service levels, some Councillors indicated a need for greater leniency when it comes to minor policy infractions, or when customer needs deviate slightly from existing processes.

Several Councillors indicated that Town processes have not been designed to prioritize the customer experience. Rather than spend time explaining processes that are not intuitive, the Town should re-engineer processes from a customer perspective.

### 5.1.6. Role of Members of Council in Customer Service Requests

Members of Town Council have a variety of perspectives on the appropriate role of individual Councillors when it comes to the Town's customer service. These perspectives include:

- **Council as Board of Directors** – Many, but not all, Members of Council view their role in customer service much like that of a Board of Directors. These Councillors feel they do not need to be involved in day-to-day issues management or individual constituent requests but instead, are accountable for ensuring Town processes are working effectively and resources are used efficiently.
- **Councillors as Concierges** – Because current Town processes are confusing and do not meet expectations for responsiveness, Councillors have become a necessary resource for constituents who are lost in the process and require assistance. For Councillors who expressed this perspective, there is an expectation that investments in customer service would eliminate these gaps.
- **Councillors as Visible Champions for the Constituent** – Some Councillors expressed reluctance to refer constituents to automated channels because residents rely on elected officials to be champions for their needs. These Councillors feel it is important for them to take accountability for constituent needs, ensuring requests are not bounced across channels and portfolios and remain visible throughout the process.

It is also important to note that Councillors' roles in addressing constituent requests are becoming increasingly complex as the number of methods to reach Members has increased. Particularly with increasing use of social media, providing responsive service on all platforms can be difficult, especially for part-time Councillors.

### 5.1.7. Volumes by Service Type

Councillors indicated the following as the top service and information requests they encounter from constituents:

- By-law, particularly parking and property standards.

- Operations, including traffic, roads, parks, litter, and construction.
- Police issues related to speeding and community safety.

It should be noted that most Councillors indicated that residents frequently contact them after experiencing frustration with general Town intake processes. For some Councillors, these types of requests comprise 50 per cent or more of their interactions with constituents.

### 5.1.8. Potential Barriers to Service Access

Councillors noted that the Town of Milton is well suited to digital service delivery because it is home to a young, highly educated population with relatively strong broadband access. However, Councillors raised the following potential barriers that need to be considered as part of the Customer Service Strategy to ensure no residents are left behind:

- **Digital Access** – While most residents have access to reliable high-speed internet, there are some parts of the Town (particularly in rural Ward 1) where reliable access is lacking.
- **Digital Literacy** – While demographics in Milton demonstrate a young average age, there are populations of senior citizens whose preferences for service channels will need to be considered.
- **Language** – While the majority of Miltonians are currently comfortable with conversational English, the Town should continue to monitor the need for translation services. There are a large proportion of Miltonians whose mother tongue is a language other than English and may feel more comfortable accessing services in a different language. Translation is particularly important to consider when it comes to providing information related to public safety and emergencies.
- **Accessibility** – Councillors acknowledged a continued priority for accessibility and accommodations for persons with a disability. Within the Milton context, special consideration is required for the hearing impaired. Training to support individuals with mental health needs is also important.

## 5.2. Departmental Leaders

A series of five department-based consultations were held with leaders from across the organization involved in providing service to internal and external customers.

While most of the conversations centred on discussing processes related to service transaction types, there was also discussion on the advantages and disadvantages of current approaches.

Common themes from departmental leaders included:

- **Lack of Capacity for Data Entry** – Because the Town of Milton is a lean organization, there are limited resources available to manually track and record customer queries. Some departments prioritize satisfying customer needs over data entry and are unable to systematically record these requests without additional staff resources.
- **Inefficient Processes for Status Updates** – Because there is no systematic, enterprise-wide approach to tracking the customer journey, it is difficult to assist customers seeking updates on the status of their requests. Many leaders expressed that too much time is spent tracking down the status of queries.
- **Multiple Entry Points** – Leaders expressed frustration for instances when a single request enters the organization through multiple intake channels or email accounts. This leads to service issues, such as multiple people taking ownership of the same request, or no one taking accountability and assuming someone else has resolved the issue.
- **Risk of Misinterpreting Regulation** – Particularly for Planning and Development Services, leaders cautioned against allowing employees with general knowledge to respond to queries related to provincial legislation and development by-laws because careful interpretation is required.
- **Data Integrity** – Various departments require property information when responding to customer requests. Property information exists in various places in the organization and is not always consistent. As a result, there is not complete trust in the information.
- **Cross-Departmental Processes and Internal Service** – Some customer service workflows (for example, application reviews) span multiple divisions and departments. Without clear service levels and collective awareness and ownership of goals and policies, the customer experience is inconsistent or there is a risk of bottlenecks in various stages of the process.
- **Gaps in After-Hours Service** – Outside of regular business hours, the Fire Service Communications team provides an after-hours answering service for other Town departments. The team is not well equipped to respond to the wide variety of requests entered through the service, and there are no other Town staff available to assist the team after 4:30 p.m.<sup>5</sup>

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<sup>5</sup> Some Town services leverage or are considering leveraging third party contracts for after-hours service.



## 5.3. Project Strategic Advisors

Additional internal consultations were held with strategic advisors who are involved in enabling corporate-wide customer service by providing tools and services to assist the work of operating departments.

The following strategic advisors were identified and consulted as part of the project:

- **Information Technology** – For an organization the size of the Town of Milton, it is not possible to deliver effective customer service without strategic advice on technology solutions and the expertise required to support them. Information Technology is the central internal service when it comes to advising and supporting technology solutions to meet departmental business needs. The division also plays a lead role in research, procurement, and implementation of a potential CRM solution for the Town.
- **Strategic Communications** – The customer experience is a central part of an organization’s brand and as such, the Strategic Communications team has a stake in the Town’s Customer Service Strategy. The team also manages quickly-evolving customer service channels such as social media accounts and general website queries.
- **Strategic Initiatives and Business Development** – Strategic Initiatives and Business Development advisors play a key role in corporate integration through major corporate initiatives and liaison with the corporate-wide Leadership Management Team (LMT). Through the work of Economic Development, the team also has recent and direct experience in the implementation of a Customer Relationship Management system (Salesforce).
- **Recreation and Culture** – Recreation and Culture works closely with divisions across Community Services and oversees many resident-facing customer service channels. They have been intentional about developing a service culture within their team and have direct and recent experience implementing a significant new digital service delivery and workflow management platform (PerfectMind).

The following themes emerged from discussions with strategic advisors.

### 5.3.1. Establish an Enterprise-Wide Service Culture

The Town of Milton’s Strategic Management Team (SMT) has communicated that customer service is a priority, and the next step is to translate this priority into a culture of customer service that spans all divisions, departments, and employee groups.

Strategic advisors noted that, while the Council-Staff Work Plan has been helpful to identify and triage priorities, the Town lacks an entrenched set of corporate values to guide staff work and anchor performance management.

Without an entrenched value of customer service, it may be difficult for employees to understand that every Town of Milton employee is accountable for exceptional service. Requests from residents must be seen as a priority for all employees, not as a burden that distracts employees from their “real” jobs.

### 5.3.2. Empower Frontline Employees

To perform customer service effectively, employees must be empowered in their roles. Empowering frontline employees includes:

- Ensuring access to information and systems necessary to fulfill customer needs, even when customer needs transcend the portfolios of individual divisions or departments.
- Providing employees with more authority to be flexible in the interpretation of policies and processes to meet customer needs.
- Ensuring employees have appropriate training and tools to address difficult situations or unique customer needs.

As part of empowering frontline employees, it is important to professionalize customer service roles at the Town of Milton.

In many instances, frontline roles are seen as entry points into the Town and are vacated when other opportunities arise. Often, customer service roles are part-time and/or temporary and are not highly regarded within an organizational context.

### 5.3.3. Make Internal Customer Service a Priority

For employees in frontline customer service roles, it can be difficult to address customer requests because doing so requires timely information from other departments. A greater recognition of the importance of internal customer service is required for employees who are not in frontline roles, with training and education on the importance of teamwork and timely information to support the responsive resolution of external requests.

To reduce the need for internal information exchange, it is important for the organization to have a comprehensive, corporately accessible, up-to-date knowledge base so employees on the frontlines are empowered to respond directly to customers on the first interaction, involving other employees only for unique situations or when customers require direct access to technical expertise.

### 5.3.4. Create Capacity for Business Intelligence

Except for website analytics, opportunities to monitor enterprise-wide performance for the Town’s customer service are limited. Many divisions do not have access to the technological resources to track data and run reports outside of manual processes. Where the technological capacity exists, there

are few areas where training and culture are in place to leverage these tools effectively.

As a result, it is difficult to make evidence-based decisions and recommend investments in improvement. Because information is anecdotal – or only available on a divisional or departmental basis – it is challenging to reconcile departmental requests against established corporate-wide criteria or service standards.

### 5.3.5. Improve Existing Digital Channels

Because Milton is a young, highly educated population, and because residents are increasingly familiar with digital channels since the onset of the global pandemic, there are opportunities to offer more services in an online format, offering customers the ability to self-serve at a time, on a channel and from a device that is most convenient for them.

To facilitate greater transition to digital service delivery, more attention is required for the following intake channels:

- **Website** – The Town of Milton website requires review and development to facilitate easier navigation and capability from a service delivery perspective. The current format is better suited to file posting and is not intuitive for customers seeking Town services.
- **Social Media** – Beyond sharing information and promoting programs and services, customers are increasingly looking to social media accounts to request information and initiate service requests. In most municipalities, including the Town of Milton, these channels are not well integrated in overall customer service workflows.

### 5.3.6. CRM Solution is Only Part of the Solution

Many of the strategic advisors emphasized that a potential CRM platform is merely a tool to enable more effective customer service, and the act of procuring a CRM alone will not solve current customer service issues.

The following are prerequisites prior to a CRM implementation:

- Consistent with an enterprise-wide initiative of this scale, it will be important to appoint a dedicated project team charged with responsibility for implementation. It will also be important to ensure project management and change management are core competencies within this team.
- All existing intake processes need to be reevaluated, streamlined, and redesigned from the customer perspective, ensuring the remaining intakes are equipped to handle increasing volumes of service requests.
- A prioritization framework is required, as it will not be possible to integrate all services at once.

- Process maps for each service are necessary to ensure existing customer journeys are as intuitive as possible prior to integration in the CRM.

### 5.3.7. After-Hours Service

Currently, support for Town services after regular business hours is inconsistent across the organization.

Most services offered through departments at Town Hall are only available during the regular business hours of 8:30 a.m. to 4:30 p.m. (except where self-serve options are available online).

Recreation and Culture services are more likely to require support beyond these hours, consistent with hours of operation for community centres. While the Town's social media accounts attempt to manage citizen expectations for after-hours response, the reality is that residents anticipate responses after-hours and communications staff are regularly working into the evening and throughout the weekends to meet these expectations.

There may be opportunities to offer more support after-hours if staff at community centres are resourced appropriately and have access to relevant systems and information through a robust knowledge base.

## 5.4. Employees in Customer Service Roles

In August and September 2021, feedback and ideas were sought from employees in customer service roles through a series of four virtual focus groups. A total of 36 employees participated in the sessions, each representing a cross section of Town departments and divisions.

The goals of the focus group were to:

- Understand the employee experience in serving the Town of Milton's customers.
- Understand how the organization can help them to enhance customer experiences.
- Collect other ideas and feedback.
- Work collaboratively across departments and divisions.

Feedback from participants is described below.

### 5.4.1. Employee Customer Service Experiences

Employees who support customer service at the Town of Milton assist a wide variety of customer types. The largest category of customers is residents but there are many additional customer types. The most common customer types for employees who participated in virtual focus groups are:

- Residents.

- Developers, contractors, and the agents representing them.<sup>6</sup>
- Internal customers and colleagues.
- Non-residents, particularly in programs at the Mattamy Cycling Centre and First Ontario Arts Centre.
- Government agencies such as Halton Region, local school boards and Conservation Halton.
- Real estate agents.
- Site selectors.

While there are currently no corporate-wide policies that mandate service standards and response times, many teams strive to be as responsive as possible to customer requests.

When asked how long it takes to respond to customer requests (including acknowledgement of receipt and communicating next steps and timelines) most participants indicated they were able to respond on the spot, same day or by the next business day.

Quick response is, however, complicated by several factors, including the need to check multiple intake channels, manual processes, insufficient staffing, and repeat requests through multiple channels. Participants noted that process changes resulting from public health regulations have led to limited opportunities to serve customers on the spot resulting in backlogs in voicemail systems and email inboxes.

When asked how long it takes to resolve customer requests (work order complete and ticket closed), responses varied widely across participants.

Some employees can resolve requests within a day or two (particularly for requests such as payment and program registration) while others indicated resolution could take a week or more for development requests, permits and approvals. Most participants indicated they can resolve customer service requests within one to two business days if the customer request relates to straightforward queries about Town services, programs, and regulations.

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<sup>6</sup> Employees who serve this customer type have noted that a larger proportion of their time has been spent with residents since the onset of COVID-19, as homeowners seek to work on their properties.

## 5.4.2. Challenges in Providing Exceptional Customer Experiences

Participants cited the following challenges when providing exceptional customer experiences to Town customers:

- **Volumes and Resources** – Particularly for employees who have worked for the Town for a decade or more, participants noted that maintaining the service levels they have historically been able to offer has become unsustainable due to growth in population and development in Milton. Participants explained that, as volumes have continued to increase at a rapid rate, there have been few or no additional staff resources that allow the Town to keep pace with its service standards.
- **Customer Expectations** – Almost all participants in the focus groups indicated that, in addition to increases in the volume of service requests, the expectations associated with these requests has increased “somewhat” or “significantly.” The nature of these expectations relates to speed and have heightened since the onset of COVID-19.
- **Barriers to Access** – Another challenge to providing exceptional customer service relates to assisting those with barriers to access, such as language barriers, digital literacy, digital access, and accessibility.
- **Duplicate Requests** – Participants explained that it is common for customers to enter a request through multiple intake channels in search of the fastest channel. Frequently, a single request can enter through multiple departments, divisions and through Members of Council simultaneously. This practice increases backlogs and makes service and information requests more difficult to synchronize and track.
- **Multi-Disciplinary Requests and Internal Customer Service** – Particularly related to development, approvals, land availability, and permitting, a single customer request will often require input and attention from commenting agencies across departments and with external regulators. It can be difficult to guarantee response times or provide accurate timelines to customers without knowledge of availability, workloads and other factors impacting the responsiveness of other teams.
- **Status Tracking** – Many of the Town’s customer service processes are manual, or span multiple platforms such as website forms, email inboxes, SharePoint files, Excel files and work order systems. It can be time consuming to track the status of requests as different teams with different systems become involved.

- **Decreased Awareness of Roles and Responsibilities** – Some participants noted a high turnover in customer service roles which has impeded the ability of staff to triage service requests and route them to the correct teams and individuals. This has resulted in the need to “bounce” customers across service areas in search of the staff who can assist them.

### 5.4.3. Suggestions for Town of Milton Support

When asked what the Town of Milton can do to help them provide exceptional customer experiences, participants offered the following suggestions:

- **Resourcing Commensurate with Growth** – Some participants noted that Town staff have been expected to “do more with less” as the Town grows. For the most part, staff have been up to the challenge, but Milton’s rate of growth has reached a point where maintaining service levels is impossible without further investment in staff resources.
- **Enterprise-Wide Customer Service Training and Knowledge Sharing** – As Town operations change and new faces join the organization, it is important to share information on services, roles, and responsibilities on an enterprise-wide basis to serve the needs of customers effectively. Some participants suggested training sessions and “lunch and learns” and others are asking for a centralized directory and knowledge base of common queries across Town operations. This type of knowledge base could assist in satisfying customer needs on the spot, without transferring the customer across multiple divisions or departments.
- **Consolidated Customer Service and “One Stop Shopping”** – Participants who have worked in larger municipalities with centralized customer contact centres or “311” services expressed that the Town is at or reaching a population size where a centralized, enterprise-wide approach to customer service is necessary. As Milton grows, it will become increasingly difficult to consistently provide exceptional customer experiences with traditional, decentralized models.
- **Tools to Assist Customers with Barriers to Access** – Currently there are few corporately available resources to staff who encounter customers with barriers to access. Customers with language barriers are becoming increasingly common and, particularly with mask requirements and social distancing measures, meeting the needs of these customers is now even more challenging. Participants also noted that customers in the seniors’ population have reported challenges in accessing Town services during COVID-19 as the Town transitioned to digital service delivery.

# 6.0 Proposed Foundation for Town of Milton Customer Service

Based on the research described in the previous sections, the following pages propose a framework for the Town of Milton Customer Service Strategy. This section includes:

- A summary of key themes that demonstrate current state and desired future state for customer service.
- Proposed guiding principles that are tailored to the Town of Milton's unique needs and opportunities.
- Working goals to provide guidance at significant decision points during implementation.

## 6.1. Summary of Key Themes

The below table reports key themes that were evident during the research process and raised during consultations with employees, leaders, and Members of Council.

Each theme is described in terms of current state and desired future state for the Town of Milton's customer service.

<b>Current State:</b>	<b>Desired Future State:</b>
<ul style="list-style-type: none"> <li>• Customer service seen as a short-term corporate priority.</li> </ul>	<ul style="list-style-type: none"> <li>• Entrenched culture of customer service, supported by vision, mission and values.</li> </ul>
<ul style="list-style-type: none"> <li>• Prioritizing service resolution over data entry.</li> </ul>	<ul style="list-style-type: none"> <li>• Prioritize both service resolution and systematic tracking and monitoring against approved standards.</li> </ul>
<ul style="list-style-type: none"> <li>• Many doors into the organization.</li> </ul>	<ul style="list-style-type: none"> <li>• Fewer, streamlined doors that are equipped to assist customers on a range of frequently accessed Town services.</li> </ul>
<ul style="list-style-type: none"> <li>• Finding the right person.</li> </ul>	<ul style="list-style-type: none"> <li>• Empowering frontline employees to assist.</li> </ul>
<ul style="list-style-type: none"> <li>• Manual processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Automated processes.</li> </ul>
<ul style="list-style-type: none"> <li>• Separate software solutions and platforms.</li> </ul>	<ul style="list-style-type: none"> <li>• Integrated software solutions and platforms.</li> </ul>
<ul style="list-style-type: none"> <li>• Council as concierges.</li> </ul>	<ul style="list-style-type: none"> <li>• Council as partners.</li> </ul>



## 6.2. Guiding Principles

The following guiding principles are proposed as the basis for the Town of Milton's Customer Service Strategy.

### 6.2.1. Customer-Focused

**The design, organization, and implementation of customer service frameworks, channels, and processes prioritize customer experience.**

Traditional approaches to customer service prioritize an organization's ease of implementation and are not always intuitive to the customer. Examples of traditional approaches include siloed structures, access points that are organized by departments and divisions instead of services, and processes that require significant explanation to customers.

Modern approaches to customer service prioritize the customer experience by breaking down organizational silos and redesigning processes from the customer's perspective. Examples of modern approaches include consolidated access points, redesigned processes through customer journey mapping, and data collection to measure customer satisfaction.

### 6.2.2. Empowered

**Customers are empowered with self-serve options and frontline employees are empowered with the tools and information they require to provide exceptional service.**

Empowering customers and frontline staff for commonly accessed information and services increases responsiveness and provides an opportunity to reduce time spent by technical experts, senior managers, and Members of Council on tracking and following up on customer requests.

### 6.2.3. Evidence-Based

**Decisions are made according to objective information, based on tracking and monitoring against established standards.**

The effectiveness of the Town of Milton Customer Service Strategy relies on a corporate-wide commitment to collect and monitor customer service data against approved and well communicated corporate-wide customer service standards. While not easy to implement on an enterprise-wide basis, data collection is foundational to ensuring the effectiveness of the Town's customer service and determining the need for increased investments or changes to service levels.

### 6.2.4. Technology-Driven

**Strong customer service processes are consistently and efficiently applied through automation and platform integration.**

A key theme within the Town of Milton Customer Service Strategy is replacing siloed manual processes with integrated, automated processes.

At present, significant staff resources are spent on manual data entry, tracking the status of customer requests, and evaluating processes. Increased use of technology – whether a new CRM solution or broader, more consistent use of existing workflow management solutions – provides opportunities to increase service responsiveness while minimizing the level of effort by employees.

## 6.3. Working Goals for Town of Milton Customer Service

Two goals are proposed to provide clear direction during the implementation of the Town of Milton Customer Service Strategy. These have been termed “working goals” as the Town may wish to provide further detail and refinement as enhanced corporate-wide data becomes available.

### 6.3.1. Consistently High-Quality Customer Experiences

The first goal is to create consistently high-quality customer experiences. To demonstrate progress toward this goal, the following steps are necessary:

- Systematic collection of customer satisfaction data after service transactions.
- Assessment of customer satisfaction based on service channel (online, counter, phone, other).
- Understanding customer satisfaction by service area to assess where additional attention or investment may be required.

As baseline customer service satisfaction data becomes available, the Town may wish to refine this goal with a measurable target, for example “80 per cent customer satisfaction rate average across Town of Milton services.”

The Town may also wish to implement a regular customer service survey to understand broader opportunities that may not be evident when feedback is collected at a transactional level.

### 6.3.2. 60 Per Cent First Contact Service Resolution by 2026

The second goal is to ensure that, when customers reach out to the Town for commonly accessed information and services, their needs are met at the first point of contact regardless of channel.

Progress toward this goal will offer the following benefits:

- More responsive service for customers.
- Reduced escalation, minimizing time spent on requests by technical experts, senior managers, and Members of Council.

As a working goal, 60 per cent first contact resolution by 2026 has been recommended as a starting point, as the Town of Milton begins the process of corporate-wide data collection and moves to integration of most accessed services.

Careful attention will be required to ensure first contact service resolution occurs consistently across all delivery channels – website, in-person, and telephone. In time, the Town may also wish to consider systems to enable first contact service resolution through the Town’s social media channels.

# 7.0 General Recommendations

To advance the goals and guiding principles described in the previous section, this report contains 18 recommendations across six categories. The recommendations are described below.

Implementation options for these recommendations are included in [Implementation Options](#), Section 8, which vary based on resource availability and corporate appetite for change.

## 7.1. Building the Foundation

The first step in implementing the Customer Service Strategy is to build a corporate-wide foundation by establishing a culture of service, determining a prioritization framework, developing customer service standards, and clarifying resourcing service levels.

This foundational work is required to facilitate change management and protect the organization's investments in customer service during implementation.

### 7.1.1. Build a Culture of Service

Employees who were consulted throughout the project expressed appreciation that Council and the Strategic Management Team have identified customer service as a priority within the Council-Staff Work Plan. Some employees, however, are concerned whether customer service will remain a priority in the future, particularly following the municipal election when the current work plan expires.

To sustain momentum as a continued priority and a central pillar to the Town of Milton's core objectives, customer service should be entrenched as a permanent aspect of the Town's corporate culture.

As a starting point, it is recommended that the Town revisit its vision, mission, and values to ensure service is clearly and consistently communicated to all employees as a central objective for the organization, with ongoing engagement with employees to strengthen this culture, and reinforcement through rewards and recognition. In time, the Town may wish to consider including standard customer service objectives in performance management discussions.

### 7.1.2. Determine a Priority Framework

The Town of Milton offers 179 service transactions across 31 divisions – addressing all customer service improvements at once is neither possible nor recommended. Regardless of the implementation option selected by the

Town, a prioritization framework is necessary to ensure the implementation process is manageable.

Leveraging the working goal of “60 per cent first contact service resolution by 2026,” the following framework is recommended to ensure implementation occurs in phases that are designed around customer needs:

1. **Service Integration Prioritized Based on Volumes** – When prioritizing improvements and service integration, it is recommended that the services and information most accessed by customers are integrated first.
2. **Residents First** – The Town serves many different customer types including businesses, contractors, real estate agents, other levels of government, school boards, community agencies and non-residents. However, when considered across Town business lines, residents are the most common customer type and, as taxpayers, comprise a significant revenue stream for the Town. As such, it is recommended that residents are prioritized as the priority customer group within the context of the corporate-wide Customer Service Strategy.

### 7.1.3. Create and Communicate Customer Service Standards

Common, corporate-wide standards for customer service form a target to assess the Town’s performance and are central to evaluating the effectiveness of customer service initiatives. When speaking with employees, there was low awareness of the existence of customer service standards. Where standards exist, they appeared applicable only to individual teams or divisions.

To address this issue, draft customer service standards for the Town of Milton have been proposed under [Proposed Customer Service Standards](#) in Appendix 2.

These standards are based on research in comparable communities and discussions with employees related to feasibility and existing resources. The proposed standards separate *service response* (meaning timelines associated with acknowledging customer requests and communicating next steps), and *service resolution* (meaning completion of a service request from start to finish). Timelines associated with service resolution are contingent on approved service levels, described in the next section.

### 7.1.4. Monitor Resources Associated with Service Levels

The customer service standards proposed in [Proposed Customer Service Standards](#) Appendix 2, mandate corporate-wide timelines for response but allow for variations in timelines for service resolution.

The reason is that service resolution is highly contingent on staff capacity, with some divisions better resourced for service resolution, or with more

straightforward services, than others. To recognize the need for flexibility, it is recommended that standards pertaining to service resolution are tied to service levels in each business line as determined through the annual budget process, recognizing that investments in service levels are investments in customer service.

It should be noted that there are areas in the organization where service resolution occurs at first contact, within the same day, or within two business days. However, because service resolution varies based on business line and the complexity of requests, mandating corporate-wide timelines would be premature in the absence of further analysis.

## 7.2. Create Capacity for Evidence-Based Approaches

When faced with limited resources and manual processes, leaders and employees at the Town of Milton have had to prioritize resolving customer requests over systematic tracking and monitoring for customer service performance.

While this is the right decision within this context, with a high growth rate and increasing service demands, rapid, reactive responses to individual customer service requests alone are not sustainable over a long-time horizon. A greater emphasis on performance measurement – including data entry and monitoring – is required to make evidence-based decisions on investments and proactively anticipate issues.

### 7.2.1. Administer a Customer Satisfaction Assessment Program

A customer satisfaction assessment program measures how customers feel about their service experiences. It is recommended that the Town consider the following tactics in its assessment program:

- **Town-Wide Customer Service Satisfaction Survey** – Particularly since engagement with Town residents was not within the scope of this project, it is recommended that the Town implement a regular customer satisfaction survey for Milton residents. This information would provide high-level perspectives from residents across Milton and include perceptions from those who might have limited direct interaction with the Town.
- **Post Transaction Data Collection** – Customers should be provided with an opportunity to provide feedback on their experience after each transaction with the Town, particularly when accessing services through the website and in-person. This data can be used to determine opportunities for continuous improvement and, in time, provide valuable information for employee recognition.

## 7.2.2. Enable Systematic Data Collection and Performance Measurement

In addition to collecting information from customers on their experience, there is a need to collect information on response times, resolution times, status of requests, and request transfers on a consistent, corporate-wide basis. This information will help the organization determine if they are advancing the working goal of “60 per cent first contact resolution” and identify where there are barriers that require further attention and investment.

Wherever possible, data collection processes should be automated as employees have expressed that manual entry and limited staff capacity is an obstacle to data tracking. This is an important consideration should the Town pursue a CRM solution. In the absence of a CRM, there may be opportunities to better leverage existing workflow management systems through expanded use and staff training. Employees have noted that systems must be intuitive and user friendly to facilitate data entry and integration.

## 7.3. Establish Smart Processes

Given Milton’s high rate of growth, employees have expressed that they feel it is unlikely that current divisional and primarily manual customer service management processes will be capable of maintaining current customer service experiences without ongoing investment in staff resources to manage multiple intake channels, handle an increasing number of requests, navigate various departmental standards, enter data, and expedite manual processes.

The below recommendations are proposed to mitigate the ongoing, long-term need for additional departmental resources, reduce backlogs, and streamline access for customers.

### 7.3.1. Streamline Customer Access Points

The Town’s current approach emphasizes getting customers to the correct individual or team to respond to queries and initiate service transactions.

With over 179 types of service transactions, and an even greater potential number of information requests, the Town has established many access points into the organization. There is high risk of customers being directed to the wrong individual, delays associated with follow-up, and unpredictable workloads for staff.

It is recommended that the Town significantly reduce the number of access points into the organization and ensure the remaining access points are equipped to handle the most common service transactions and information requests. This might include reducing the 40 phone numbers currently advertised to a single phone number and limiting service counters to one per facility that offer a range of services to customers.

### 7.3.2. Complete Customer Journey Mapping

It is recommended that the Town retain business analysis expertise to complete customer journey maps for the most accessed services, assessing opportunities to enhance the customer experience and realize efficiencies in the workflows for each service transaction. Should the Town proceed with procuring an enterprise-wide CRM solution, customer journey maps should be completed before services are integrated.

### 7.3.3. Prioritize Automation over Manual Processes

Further to the section above, once customer journey maps are complete, resulting processes should be automated wherever possible to expedite service delivery, reduce level of effort from staff associated with manual processes, and improve tracking and performance measurement.

Most of the Town's 179 service transaction types involve varying degrees of manual processes and there are opportunities for continuous improvement through automation.

### 7.3.4. Transition to a “Digital First” Approach While Addressing Barriers to Access

With a comparatively younger and well-educated population, Milton is well positioned to provide digital self-service options for its customers. Doing so will provide customers instant access to the services they need at a time and location that is most convenient for them and, in time, will mitigate the staff level of effort required to respond to customer requests.

To influence customer behaviour change and encourage residents to access digital services first, digital services should be incentivized and easy to access and navigate.<sup>7</sup> The Town's website is the primary channel for digital service delivery and should be structured so navigation is intuitive to the customer.

As Milton continues to implement digital services, careful attention will be required to ensure that customers with barriers to access are considered.

The Town should explore translation services for commonly spoken languages and investigate translation options for the website. In-person and telephone services should continue to be offered to residents who feel more comfortable with these channels. These channels should also be readily available to customers who require additional support when accessing digital services.

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<sup>7</sup> To encourage a digital first environment, the Town should eliminate any additional fees associated with digital service, for example the \$2 convenience fee for online parking ticket payment. Town staff have indicated this charge will soon be phased out.



### 7.3.5. Address After-Hours Service Issues

Currently, Fire Services Communications is the designated number for urgent after-hours requests. The team receives queries on a wide variety of issues, such as animal control, lighting issues, illegal dumping, snow removal and other service issues. The team is not always equipped to provide first contact resolution and does not normally have access to colleagues in other departments after 4:30 p.m. and before 8:30 a.m.

It is recommended that the Town further investigate the demand for after-hours service. Enhancements to the website and increased digital service offerings is a part of this strategy as the website offers the potential for 24/7 access to Town services. The Town may also wish to offer extended hours of service, potentially through partnerships with Community Services staff at community centres with longer operating hours.<sup>8</sup> A robust corporate-wide knowledge base that is accessible to employees at community centres and with Fire Service Communication would increase capacity for after-hours customer service and first contact resolution.

## 7.4. Support Employees

Even as services are increasingly offered online, the Town's employees remain essential to the Town's customer service. Employees are required to assist when there are barriers to digital access or when additional assistance is required.

Employees also need to be familiar with software solutions to ensure seamless customer experiences and generate analysis and reporting that the organization requires. The following recommendations are intended to support employees in providing exceptional customer experiences.

### 7.4.1. Professionalize Customer Service Roles

The Town of Milton is currently experiencing challenges with high turnover in customer-facing roles. The part-time or temporary nature of some roles, and facility closures and process changes during the COVID-19 pandemic, have contributed to this turnover but it exists even where positions are full-time and permanent leaders have expressed challenges in retaining employees in customer service roles. In discussions with leaders, it appears that these roles are seen as an entry point to other roles within the Town.

It is recommended that the Town review job descriptions associated with customer-facing roles across the organization to ensure responsibilities and

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<sup>8</sup> In discussion with leaders in Community Services, there is openness to exploring these partnerships as long as there is recognition of current customer service capacity issues at community centres.

job rates are commensurate with customer service as a modern, professional vocation, consistently applied in roles across the Town.

#### 7.4.2. Build a Central Knowledge Base with High Employee Access

A knowledge base is a trusted source of information for commonly asked questions on services across the organization. Providing a central knowledge base that is accessible to frontline employees offers the following benefits:

- Empowers frontline employees to assist customers, even when questions pertain to business lines outside of their division.
- Reduces the need to transfer customers across departments when it comes to commonly asked questions or commonly accessed service transactions.
- Provides leaders and subject matter experts with confidence that correct, consistent and up-to-date information is provided to customers.

The Town's website can serve as a central knowledge base in the absence of a corporate-wide CRM solution. The organization is currently improving the effectiveness and relevancy of the external website, and this information can be imported to a CRM solution should the Town choose to procure one.

#### 7.4.3. Support Strong Internal Customer Service to Enable Exceptional External Service

Where customer requests cannot be resolved at first contact, it is sometimes necessary to obtain information from colleagues in other divisions or departments. As such, the importance of internal customer service must be reinforced with all employees – not just employees in frontline roles – to enable exceptional external customer service.

Based on employee feedback, the Town fares relatively well when it comes to getting back to internal colleagues, but capacity issues can sometimes cause delays in response times.

#### 7.4.4. Provide Dedicated Project Management and Change Management

Particularly if the Town chooses to implement the Customer Service Strategy on an enterprise-wide basis, it will be important to secure dedicated project support and pay careful attention to risks when other employees are asked to participate in addition to their regular roles.

An enterprise-wide approach is a significant corporate transformation and will require strong change management practices to safeguard the Town's investments and support employees through change.

## 7.5. Enhance an “Open for Business” Environment

Most of the recommendations contained within this report are focused on residents as the most common customer type, and as a priority during the implementation process. However, it is important to note that many divisions serve business-oriented customers such as local businesses, developers, contractors, real estate agents, and site selectors.

It is also important to note that serving these customers regularly requires support across divisions, departments, and with external commenting authorities.

### 7.5.1. Focus on Customer Journey Maps for Business-Oriented Customers

Because of the varied service needs of the business community and the need for high internal collaboration across departments and divisions to meet these needs, a deeper investigation into internal processes, and transitions across departments and divisions, is necessary to assess opportunities for efficiency and enhanced customer experience.

This investigation should include customer journey maps for service transactions most accessed by business customers. Once journey maps are complete, the organization can determine whether business-oriented customers should enter through the same intakes as residents, or whether dedicated business portals or counters are required.

### 7.5.2. Establish Service Agreements with Commenting Agencies and Regulatory Authorities

Where there is uncertainty in staff's ability to guarantee service response times, it is often because expertise and commentary is required from external agencies.

In some, but not all, cases response times are legislated. Where response times are not legislated, there may be opportunities to mitigate uncertainty through service level agreements and Memoranda of Understanding to streamline processes and minimize delays for industry and developers.

## 7.6. Strengthen Customer Service Governance

During the consultation process, some Members of Council expressed frustration with their role in the Town's customer service processes.

They explained their interactions are often with residents who are having trouble navigating Town processes and they require assistance to follow-up on individual service requests. Some Councillors described their roles as “concierges” as opposed to “partners.”

### 7.6.1. Position Members of Council as Partners

Through interviews with each Member of Council, two distinct partnership roles emerged:

- **Council as Board of Directors** – The first, and most common, partnership role described by Council relates to elevating the tools and information at their disposal to monitor performance and assess the need for investment. Councillors who desire this role are seeking monthly status reports and dashboards that will provide evidence-based understanding of the Town’s customer service approach, with reduced reliance on anecdotal information from employees and residents.
- **Councillors as Champions for Resident Requests** – Even as trust in the Town’s processes increases, there are several Members of Council who wish to remain involved in resolving individual service requests and expressed they feel this is part of their duty as elected representatives. Should the Town pursue a CRM solution, several Members expressed a desire for Councillors to have the ability to assist residents with work order status requests and alleviate additional burden on staff resources.

## 8.0 Implementation Options

Depending on resource limitations and corporate appetite for change, there are different options that the Town may wish to consider as the organization proceeds with the general recommendations presented in the [General Recommendations](#), Section 7.0. It should be noted that there were several instances in discussions with both employees and Members of Council where resource shortages were cited as a significant barrier to implementation. Costs, affordability, and availability of implementation resources have been identified as key considerations as the Town proceeds with next steps.

Three options are presented below for the Town's consideration, along with the steps associated with each option over a three-year timeframe.

### 8.1. Option 1: Prioritize Tracking and Monitoring Across Town Services

The first option focuses exclusively on securing the appropriate software solutions, resources, education, and training to enable evidence-based decision-making for the Town's customer service on a corporate-wide basis.

Option #1 involves the following steps over the next three years:

1. Focus 2022 technology investments on a new CRM solution or enhancements to existing workflow management solutions that will enable systematic, corporate-wide collection of service request volumes, request transfers, customer response times and service resolution times.
2. Ensure staff training and capacity is in place to collect data regularly and consistently across the organization.
3. Create opportunities for customer feedback after each service transaction through the web and in-person channels and investigate feedback opportunities on services accessed by phone.
4. Implement a survey for Town of Milton residents once every two years to understand resident perceptions on customer service offered by the Town.
5. Conduct regular data review and analysis, with reports to the Strategic Management Team and Council at least annually.

Once tracking and monitoring systems are in place and the Town has sufficient evidence to determine priority services based on volumes (including baseline information on service response and resolution times and direct customer feedback) the Town will have a greater degree of business intelligence to inform a compelling business case for wider implementation in future years.

## 8.2. Option 2: Implement CRM and Service Level Analysis in Priority Customer-Facing Divisions

While consistent corporate-wide data is not available to obtain a definitive list of the service transactions most accessed by customers, information collected through the research process suggests the areas of greatest need for investment are by-law and parking enforcement and operations.

These services consistently appear in annual data on website page views and were most frequently cited by Councillors as services where they receive the most calls from residents.

If there are limited resources, appetite for change, or other barriers that impede enterprise-wide implementation, feedback suggests that focusing exclusively on these two areas would address many of the customer service concerns cited by Councillors.

Option #2 involves the following steps over the next three years:

1. Assign business analysis expertise to assist leaders in by-law and operations with customer journey process maps.
2. Determine opportunities to enhance customer experience and create efficiencies through automation.
3. Examine approved service levels and determine whether existing staff resources are sufficient to meet current service levels or if changes or additional resources are required.
4. Assess features of existing workflow management solutions and determine if additional CRM capabilities are required.
5. Provide education, training, change management and ongoing internal communication for impacted employees.
6. Systematically collect data on service request volumes, request transfers, response times and service resolution times with annual reports to the Strategic Management Team and Council.

Option #2 is consistent with recommendations within the Corporate Services Review (piloting a CRM solution) and Community Services Review (information technology integration in Operations division) completed between 2018 and 2020.

## 8.3. Option 3: Proceed with an Integrated Enterprise-Wide Approach

The final option focuses on setting the organization on a path to enterprise-wide customer service delivery. It involves all the recommendations outlined in the [General Recommendations](#), Section 7.0, with particular attention to the following steps over the next three years:

1. Review the organization's vision, mission, and values to ensure clear alignment with customer service.
2. Develop and implement an internal communications and engagement strategy to thank employees for their input and inform them about the Customer Service Strategy and their role in its success.
3. Establish a project office with dedicated expertise in project management, change management, business analysis, and lean process reviews.
4. Procure an enterprise-wide CRM solution that can integrate seamlessly or replace existing workflow management platforms in use.
5. Implement website enhancements as the central channel for digital service delivery and content for a corporate-wide knowledge base.
6. Standardize customer service roles across the organization and explore opportunities for co-location or centralization at Town Hall.
7. Explore potential partnerships with Community Services for in-person and telephone service at community centres.
8. Work toward a single public phone number to access Town services by phone and resource the phone channel with customer service representatives who are equipped to address most common customer requests.
9. Onboard services sequentially, prioritized based on service volumes. In the absence of corporate-wide service volume data, begin with by-law and parking services and operations as immediate priorities. Complete customer journey maps and process improvements prior to onboarding.
10. Continue to refine, clarify, and communicate service levels based on resourcing approved as part of the annual budget process.

While Option #3 is the most ambitious and resource intensive of the options – with significant change management implications across the organization – there are strategic timing advantages associated with its pursuit.

The Town of Milton is experiencing significant service delivery disruptions associated with the global COVID-19 pandemic. Emerging from the pandemic with an enterprise service delivery approach is an opportunity to define a new normal for the Town's customers and employees.

Milton's rapid rate of growth is expected to continue, with 235,000 residents forecasted by 2031. Employees are challenged to keep pace with current demand under traditional service delivery models.

## 9.0 Acknowledgements

This Customer Service Strategy was developed with support, participation, and guidance from over 70 participants in the Town of Milton.

Thank you to Members of Council for recognizing customer service as a priority within the Council-Staff Work Plan and providing input and leadership through telephone interviews in July 2021.

Thank you to the Strategic Management Team for endorsing and enabling a corporate-wide perspective on customer service and providing ongoing guidance.

Thank you to leaders who participated in departmental consultations. Feedback and validation for service transactions, and perspectives on challenges and opportunities were an invaluable part of the project.

Thank you to employees who support customer service every day. Employee participation in virtual focus groups provided important insights into how the organization can support exceptional customer service.

Thank you to members of the Project Team for their ongoing support and advice:

- Nina Lecic, Legal and Legislative Services (Project Lead)
- Mark Taylor, Strategic Communications (Project Co-lead)
- Aaron Smit, Information Technology
- Carrie Beatty, Strategic Communications
- Andy Scott, Strategic Initiatives and Business Development
- Joy Anderson, Community Services (Recreation and Culture)



# 10.0 Appendix 1 – Overview of Town Service Transactions

The below list of Town of Milton service transactions was developed in consultation with leaders from each department. The list represents service transactions only, or those services that require service intakes, work order initiation, registration and/or payment. The list does not include information requests.

## 10.1. Community Services

Division	Service Transactions
<b>Parks, Road and Fleet Operations</b>	Parks and Open Space Maintenance
	Road Repair / Maintenance Reporting
	<i>Dead Animals in Road Allowance</i>
	Road Signage
	Sidewalk Issues
	Road Sweeping
	Snow Removal:
	<i>Reporting</i>
	<i>Windrow Removal Program</i>
	Forestry:
	<i>Tree Management</i>
	<i>Tree Disease</i>
	<i>Tree Removal</i>
	<i>Tree Trimming and Pruning</i>
<b>Transit Services</b>	Conventional Transit – Tickets and Passes
	Milton Access Plus
	Transit OnDemand
	Charters

<b>Facility Operations</b>	Arrangements for Signs, Facility Rentals, Special Events
	Maintenance Reporting
<b>Recreation Programs</b>	Memberships, Passes, Drop-ins:
	<i>Cycling</i>
	<i>Fitness</i>
	<i>Sports</i>
	<i>Walking / Running</i>
	<i>Hockey, Shinny and Skating</i>
	<i>Swimming</i>
	<i>Personal Training</i>
	<i>Seniors Activity Centre</i>
	<i>General Interest</i>
	Registered Programs:
	<i>Adults 55+</i>
	<i>Fitness</i>
	<i>Aquafit</i>
	<i>Swimming</i>
	<i>Hockey and Skating</i>
	<i>Sports</i>
	<i>General Interest</i>
	<i>Preschool</i>
	<i>Virtual Programs</i>
	School Breaks
	Summer Camps
	Inclusion and Special Needs
<b>Arts and Culture</b>	Arts Programs (registered and drop-in)
	Shows and Events
	Rentals and Bookings
	Gallery Exhibition Requests

	Sports Hall of Fame
	Walk of Fame
	Events:
	<i>Community Events Calendar</i>
	<i>Downtown Street Festival</i>
	<i>Event Applications</i>
	Corporate Volunteer Program
<b>Rentals and Reservations</b>	Facilities
	Sports Fields and Courts
	Park Rentals
	Bookings for Affiliated Groups
	Special Events
	Sign Rentals
<b>Community Investment</b>	Community Fund
	Affiliation Program
<b>Sponsorship and Advertising</b>	Sponsorship
	Advertising
	Donations
	Commemorative Trees and Benches
<b>Environment</b>	Partner in applications process, inquiries regarding land requests, land negotiations
<b>Parks and Facility Planning</b>	Inquiries requiring subject matter expertise, community engagement in design process
<b>Parks and Facility Design and Construction</b>	General service area

## 10.2. Development Services

Division	Service Transactions
<b>Building Services</b>	Inspections
	Permits:
	<i>Decks</i>
	<i>Demolition</i>
	<i>Exterior Openings</i>
	<i>Basements</i>
	<i>Signs</i>
	<i>Tents</i>
	Basement Apartments
	Construction and Demolition Permits
	Complaints
	<b>Development Review</b>
<i>Subdivision / Condo</i>	
<i>OPA / Rezoning Applications</i>	
<i>Site Plan Approval</i>	
<i>Minor Variances</i>	
<i>Part Lot Control By-laws</i>	
<i>Consents</i>	
Project Information and Consultation	
Zoning:	
<i>Occupancy Permits</i>	
<i>Pool Permits</i>	
<i>Fence Permits</i>	
<i>Drawing Requests</i>	
<i>Inspections</i>	
<i>Compliance and Information Requests</i>	
<i>Complaints</i>	
Telecommunications Applications	

<b>Traffic</b>	Operations
	Signals
	Streetlights
	Transportation Impact Studies
	Crossing Guards
<b>Infrastructure</b>	Road Occupancy Permits
	Municipal Consent Permits
	Entrance Permits
	Non-Development Site Alteration Permits
	Drawing Requests
	Compliance Requests
	Complaints
	Inspections for Various Permits in the Right of Way
<b>Policy Planning</b>	Heritage Designations and Permits
	Street Name Requests
<b>Development Engineering</b>	Complaints
	Drawing and data requests
	Inspections (Permits, Subdivisions, Site Plans)

### 10.3. Corporate Services

<b>Division</b>	<b>Service Transaction</b>
<b>Legislative and Legal Services</b>	By-law:
	<i>Animal Services</i>
	<i>Noise Complaints</i>
	<i>Property Standards</i>
	<i>Parking Enforcement</i>

	<i>By-law: Other</i>
	<i>Ticket Payment</i>
	<i>Parking Tickets</i>
	<i>Other Tickets</i>
	Licenses – Business:
	<i>Filming</i>
	<i>Food Trucks</i>
	<i>Kennel</i>
	<i>Personal Services</i>
	<i>Taxi and Limousine</i>
	<i>Business License: Other</i>
	Commissioner of Oaths
	Parking Permits
	Dog Licenses
	Marriage Licenses
	Records Management:
	<i>FOI requests</i>
	<i>Accessible Document Requests</i>
	Garbage Bag Tags
<b>Human Resources</b>	Employment Applications
	Complaints
<b>Strategic Communications</b>	Media Engagement Services
<b>Information Technology</b>	Custom Map Requests
	Third Party Technical Support
<b>Council</b>	Meetings, Agendas and Reports
	Delegations
	Boards and Committees Application

<b>Taxation and Assessment</b>	Statement & Other Document Requests/Inquiries
	PAP: Program Enrollment & Account Changes
	New Homeowner/Moving
	Payment/Transaction History – Audit of Payments, Late Payment, Penalty Reversal, etc.
	General Account Inquiry: Annual Levy, Upcoming Installments, How to Pay, etc.
	Changes to Account: Mailing Address, Name Change, Ownership, etc.
	Assessment-Related Inquiries: Farm, Conservation Land, Not Fully Assessed (New Builds), etc.
	Adjustments – Refunds, rebates, etc.
	Mortgage Company & Lawyer Inquiries (Where Interest is Held / Tax Certificate Has Been Ordered)
<b>Accounting</b>	General service area
<b>Financial Planning and Policy</b>	General service area
<b>Purchasing and Risk Assessment</b>	Bids and Tenders
	Claims
<b>Development Finance</b>	Letter of Credit Management
	Development Agreement/Applications Review
	Development Charge Collection

### 10.4. Executive Services

<b>Division</b>	<b>Service Transactions</b>
<b>Economic Development</b>	New Investment / Site Selection Requests
	Data and Information Requests

	Business Partnership Services
	Covid-19 Recovery Support
	Patio Program
	MEV Innovation Centre:
	<i>Workspaces</i>
	<i>Event space</i>
<b>Office of Mayor / CAO / Strategic Initiatives</b>	Mayor Speaking Request
	Appointments / General Inquiries with Mayor
	Town Hall Tour
	Proclamations
	Flag Requests
	Town Store (Merchandise)
	Council Services

## 10.5. Fire Services

<b>Division</b>	<b>Service Transactions</b>
<b>Fire Administration</b> <i>*Suppression services including fire dispatch are outside of project scope</i>	Burn Permits:
	<i>Container</i>
	<i>Brush</i>
	<i>Agriculture</i>
	Fireworks Permits
	Fire Reports
	Fire Safety and Training Requests:
	<i>Station Tours</i>
	<i>Truck Visits</i>
	<i>Extinguisher Training</i>
	<i>Other</i>
	Home Safety Inspections
	Lock Box Registration



	Complaints
<b>After-Hours Support</b>	<p>Responsible for non-fire related calls after business hours.</p> <p>Examples include:</p> <ul style="list-style-type: none"> <li><i>Humane Society – Animal Control</i></li> <li><i>Snow Removal</i></li> <li><i>Animals Injured/Deceased or Requiring Rescue</i></li> <li><i>Access to Facilities</i></li> <li><i>Problems in Parks or Other Town Facilities (Rental Issues, Access, Others)</i></li> <li><i>Ball Park/Tennis Court Lighting Issues</i></li> <li><i>Playground Equipment Problems</i></li> <li><i>Debris on Road</i></li> <li><i>Traffic or Streetlights not Working</i></li> <li><i>By-law Issues (Illegal Dumping)</i></li> <li><i>Barricades Required by Police (Flooding, Closures) – includes liaison with Operations</i></li> <li><i>Bus Scheduling Problems</i></li> </ul>

# 11.0 Appendix 2 – Proposed Customer Service Standards

“As an organization, we are committed to enabling, supporting, and providing customer service at the customer’s first point of contact. When service requests are complex, or require greater technical support, we are committed to the following...

Acknowledging the customer’s request:

- On the spot for services accessed in-person.
- Within two business hours for requests received through social media. Where requests appear to the public, we will encourage the customer to transition correspondence through direct message or email.
- On the same business day for services accessed through the website.
- Within one business day for requests by phone and other channels.

Providing timelines and information on next steps:

- Within two business days for services accessed in-person, through social media, website, phone, email, and other channels.

Resolving the service request:

- According to standards set by our division, as established in service levels approved by Council through the Town’s budget process and service level agreements with internal and external service delivery partners.

When situations arise where our organization is unable to meet these standards, we will immediately report them to our supervisor, who will expedite the service for the customer and submit an incident report to the designated division to inform continuous improvement opportunities.”

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*Boulevard Strategy Group was pleased to work with the  
Town of Milton  
to prepare this Customer Service Strategy*

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