

# The Corporation of the City of Kawartha Lakes

## Council Report

Report Number CS2017-002

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**Date:** January 10, 2017

**Time:** 2:00 p.m.

**Place:** Council Chambers

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**Ward Community Identifier:** All

**Subject:** Customer Service Standards Strategy

**Author/Title:** Craig Shanks  
Director, Community Services

**Signature:**

**Author/Title:** Lee Anna Thornbury  
Manager, Customer Services

**Signature:**

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### Recommendation(s):

**RESOLVED THAT** Report **CS2017-002** "Customer Services Standards Strategy", be received for information.

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**Department Head:**

**Corporate Services Director / Other:**

**Chief Administrative Officer:**

## **Background:**

The City of Kawartha Lakes 2016-2019 Strategic Plan identified, as one of the City's Top 10 Strategic Priorities, a requirement to "Establish and Execute a Customer Service Standard".

At the June 21, 2016 Special Council Meeting, the Customer Services Standards outline was presented. The presentation addressed the goals to establish a customer service standard for the City of Kawartha Lakes:

- Provide Exceptional Customer Service – establish and execute a Customer Service Standard
- Enhance Communications and citizen accessibility to government services
- Service Excellence – review and adopt best municipal practices, and continue to review operational efficiencies using lean methodology

Council received the presentation with a commitment from staff to present the Customer Service Standards Strategy to Council by the end of 2016.

## **Rationale:**

The goal of the Standards is to provide exceptional customer service through the three primary channels of customer interaction – in person, telephone and web/internet. This goal is aligned with the drivers of customer satisfaction:

- Timeliness and Acknowledgement – to respond in a reasonable timeframe
- Knowledge – to provide accurate information
- Fairness – to provide fair and consistent treatment
- Courtesy – ensure politeness and respect
- Outcome – to provide a response for completeness of service

The standards focus on the key enablers of service delivery which include people, processes, technology and partnerships.

The Strategy outlines future commitments to achieve the end result, a Corporate Customer Service Standard.

By June 2017, the Customer Services Team will present the Customer Service Standards to Council for approval.

## **Other Alternatives Considered:**

N/A

**Financial Considerations:**

No financial implications have occurred to date. The standards are being created internally by City staff teams, eliminating any need for consultation funding. Information and consultation with other Municipalities have occurred, and will continue to occur to adopt best municipal practices. Training will be provided in-house.

**Relationship of Recommendation(s) To Strategic Priorities:**

The City of Kawartha Lakes Corporate Strategic Plan Framework identifies the importance of a customer service standard as one of the City's top 10 priorities.

The Customer Service Standards are aligned with the Corporate Values on the City of Kawartha Lakes Corporate Strategic Plan Framework.

*Collaboration – Continuous Improvement – Excellence – Innovation - Results*

**Review of Accessibility Implications of Any Development or Policy:**

The standards are being created in compliance with the City's Accessibility Plan and the Accessibility for Ontarians with Disabilities Act (AODA).

**Servicing Comments:**

N/A

**Consultations:**

Senior Management Team  
City of Kawartha Lakes Staff  
Municipal Colleagues

**Attachments:**

Core Service Review  
- Customer Service SI

Customer Service Standards – June 21, 2016



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Customer Service Standards Strategy – January 10, 2017

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**Department Head:** Craig Shanks, Director of Community Services

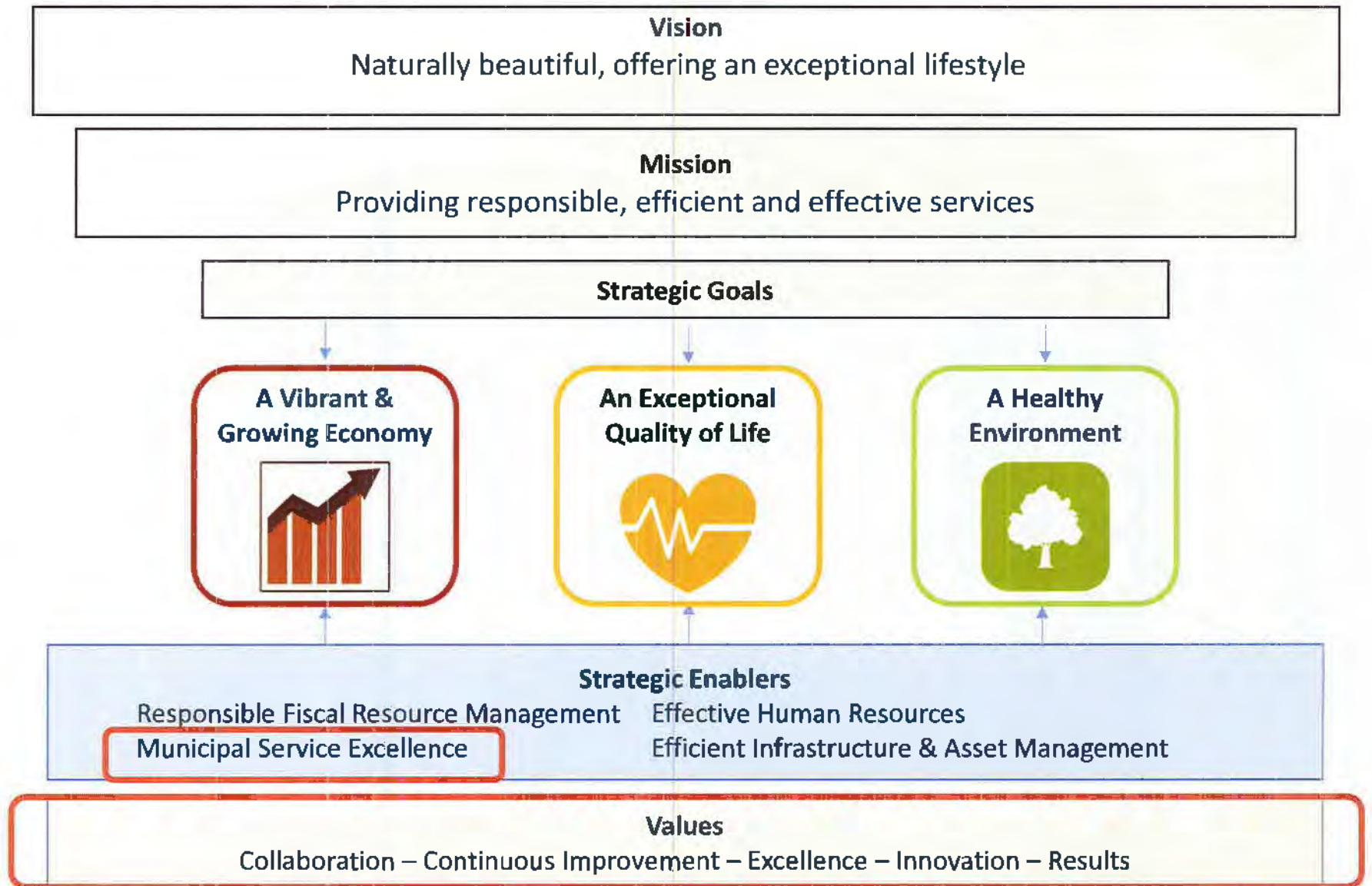
**Department File:**

# Customer Service Standard

City of Kawartha Lakes



# City of Kawartha Lakes Corporate Strategic Plan Framework





# Strategic Priority

- Provide Exceptional Customer Service
  - Establish and execute a Customer Service Standard (E3.1.1)
  
- Enhance Communications
  - Enhance communications and citizen accessibility to government services (E3.2.1)

# Strategic Priority

## ➤ Service Excellence

- Review and adopt best municipal practices (and continue to review operational efficiencies using lean methodology) (E3.3.1)

***“We need the right people in the right place at the right time”***

*Ron Taylor, CAO, City of Kawartha Lakes*

# Current Position

- Currently, there is no *overall* strategy that defines standards for providing customer service excellence internally and externally
- Some divisions already have customer service standards in place – these will be reviewed to leverage best practices



# Current Position

- Customer Service professionals within the City
- Customer Services survey launched in Jan 2016
- Gathered information from other Municipalities best practices

# Scope

- All internal and external customers will be asked to provide input to this process, including Council, SMT, staff and residents.
- A core team has been established to lead the process and sub teams will be created.

## Core Team:

Shelley Clark, Customer Services - Community Services

Barb Condie, CAO Office - Clerks

Leanne Dunn, Customer Services - Community Services

Christi Norris, Tax and Revenue - Corporate Services

Brenda Stonehouse, CAO Office - Office of Strategy Management

Lee Anna Thornbury, Customer Services - Community Services

# Scope

- Setting standards includes:
  - In-person customer services
  - Telephone calls – voicemail protocol
  - Written communication – email protocol
  - Response times
  - Accessibility
  - Feedback
- Standardization of “one size fits all” doesn’t apply - strategy to establish common service standards, respecting individual business units

# Where do we want to be?

**Vision** – For the City of Kawartha Lakes to provide exceptional customer services

**Goal** – To define our service commitment to the public and to provide staff with standards to be followed to reinforce this commitment

***“If you look after your staff,  
they’ll look after your customers”***

*Sir Richard Branson, Founder, Virgin Group*



# Actions to achieve Goals

- The following actions will be used to establish standards:
  - Consult with staff and public
  - Leverage technology
  - Best practices
  - Benchmarking
  - Establish measurements - KPIs
  - Communication – education – training



# Actions to achieve Goals

- Partner engagement will include, but will not be limited to:
  - Staff
  - Council and Committees of Council
  - Residents
  - Business owners / community groups
  - Visitors
  - Other Municipalities/levels of Government

# Timeline

- Update on the strategy will be provided to Council by December 2016.
- Strategy completion in 2017 – Q2 (tentative)

# Financial Implications

- Creating the strategy will involve staff time and resources to gather information.
- Consultant funding is not required for the development of the strategy.
- There is potential for technology upgrades. Future costs will be identified in the strategy, including any budgetary requirements.

# Measurement

- Establish KPIs relevant to departments
- A monitoring system will be created to ensure success
- Standards to be integrated into the core values and culture of the organization



# Next Steps

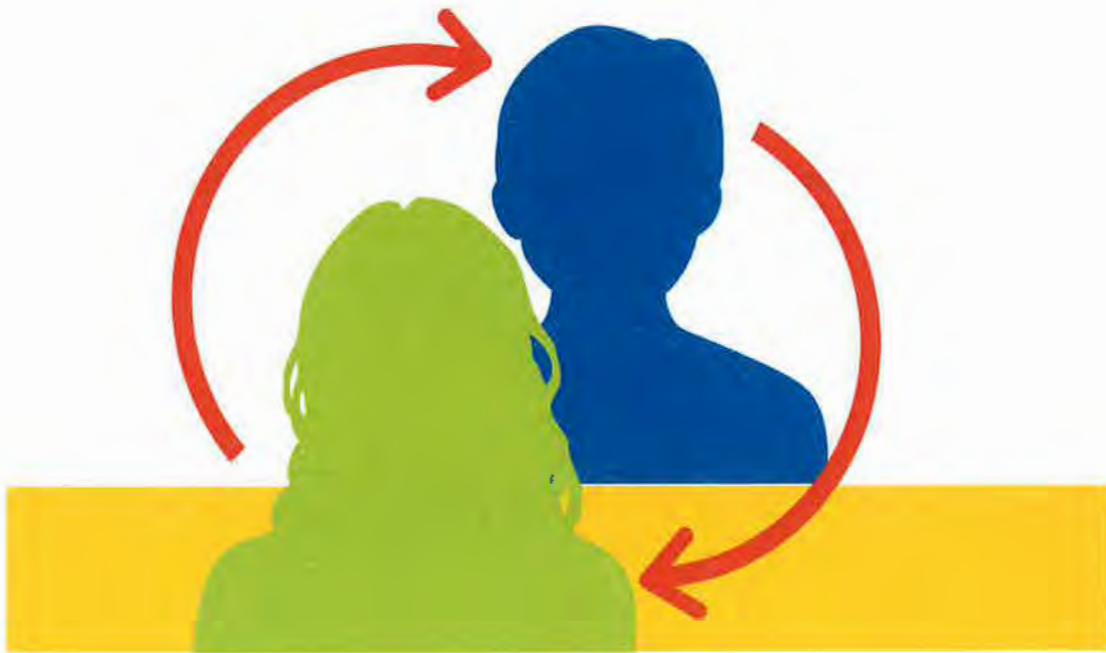
## ➤ Establish:

- Timeline and strategy
- Framework
- Meeting dates and sub teams
- Public consultation strategy



City of Kawartha Lakes

# Customer Service Standards Strategy

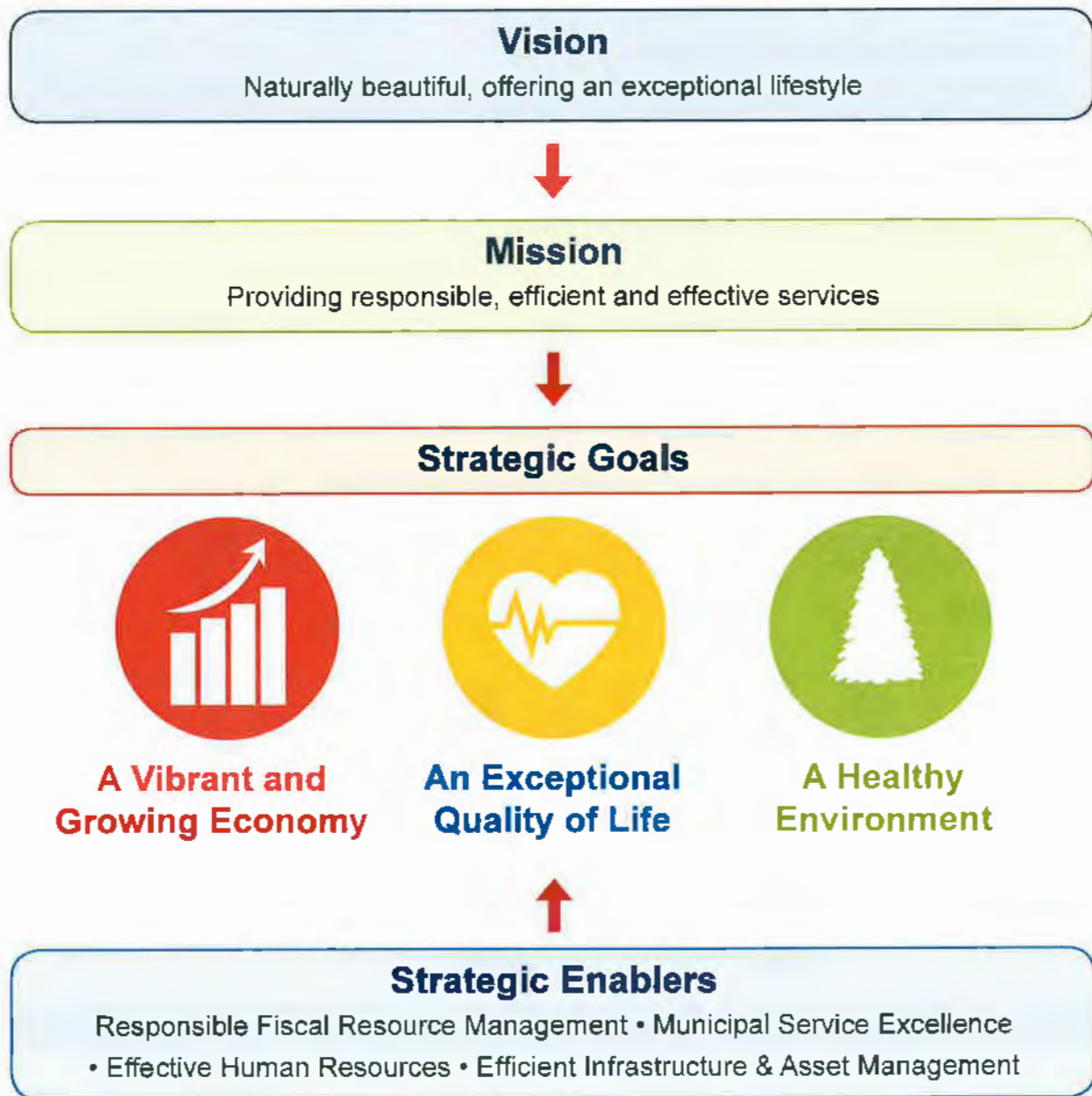


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Accessible formats available upon request.

# City of Kawartha Lakes Corporate Strategic Plan Framework



## Strategic Priority

### ✓ Provide Exceptional Customer Service

Establish and execute a Customer Service Standard (E3.1.1)

### ✓ Enhance Communications

Enhance communications and citizen accessibility to government services (E3.2.1)

### ✓ Service Excellence

Review and adopt best municipal practices (and continue to review operational efficiencies using lean methodology) (E3.3.1)

**“We need the right people in the right place at the right time.”**

Ron Taylor, CAO, City of Kawartha Lakes



## Where Do We Want To Be?

### Vision

The City of Kawartha Lakes provides exceptional customer service.



### Goal

To define our service commitment to the public and to provide staff with standards to follow to reinforce this commitment.



### Guiding Principles

(Aligned with Corporate Values)



#### Results

Focused on service excellence for positive results, measured against defined expectations and commitments.



#### Collaboration

Service excellence is possible by working together.



#### Continuous Improvement

Effective planning, evaluation, measurement and reporting.



#### Innovation

Open to new ways of doing things, explore innovative solutions and leverage technology.



#### Excellence

Strive for excellence in every working day to meet our commitment to customer service.



# What Will We Do?

## Three Channel Focus

- Improve efficiencies and customer experience across all three primary access channels – **in person**, **telephone** and **web/internet**.
- Ensure a range of options is available to meet all individual resident and stakeholder needs.



### In Person

#### We Will:

- ✓ Drive the continued development of a 'service-first' culture in the organization
- ✓ Strive to increase the number of issues resolved at the first point of contact
- ✓ Continually assess the services being offered at access points



### Telephone

#### We Will:

- ✓ Institute guidelines for live answer, voicemail and establish call back protocols for corporate phones
- ✓ Define timelines for response to common concerns (investigation time, resolution time)
- ✓ Streamline inquiries to minimize being "bounced around"



### Web/Internet

#### We Will Partner with Communications to:

- ✓ Support opportunities for self-service, online payment options and online application forms
- ✓ Support opportunities for engaging with customers using alternative methods of contact such as social media
- ✓ Set guidelines for email/mail responses
- ✓ Create email addresses for each department allowing direct inquiries

# Drivers of Customer Satisfaction

## Focus will be on the key drivers:

- Timeliness and Acknowledgement – respond within a reasonable timeframe
- Knowledge – accurate information
- Fairness – fair, consistent treatment
- Courtesy – politeness and respect
- Outcome – response and completeness of service

# Customer Service Standards

## We will develop, implement and monitor guidelines that include:

- Response levels for telephone calls
- In person wait times
- Email correspondence
- Complaint handling procedures and measurement
- Accountability for standards into continuous improvement measures
- Benchmark service standards with consideration of best practices of other municipalities
- Standards that align with AODA
- Maximum use of existing technology

# How Will We Do It?

Key enablers of service delivery are:

## 1 People

- ✓ Ensure that “customer focus” is a central component of continuous improvement plans
- ✓ Work with HR to develop an ongoing customer service training program and integrate the standards into orientation
- ✓ Provide resources, support and tools for staff

## 2 Processes

- ✓ Ensure that processes are designed to add value for the customer

## 3 Technology

- ✓ Support the new website
- ✓ Encourage enhancements of other technology to improve service

## 4 Partnerships

Work with:

- ✓ Internal and external customers to continually improve our customer service standards
- ✓ All levels of government to provide information on their respective services

# Next Steps

January - June  
2017



Review comments collected from the 2016 Customer Service Survey.
Incorporate concurrent service review recommendations (eg. Planning Approvals Task Force, Communications Strategy).
Discussions with internal stakeholders.
Implement an external and internal survey including staff and Council to evaluate customer satisfaction levels.
Review current departmental standards for customer service. Share and capitalize on department best practices.
Introduce Corporate Customer Services Standards to Council for endorsement.
Establish key performance indicators for overall customer service.

After June  
2017

Once the Standards have  
been approved:



Communicate standards to staff.
With Human Resources implement Customer Services Standards training for all staff.
Continually monitor and assess for continuous improvement.
Encourage divisions to determine and incorporate expected deliverable time frames for customer responses.

## Customer Service

**"I've learned that people will forget what you said, people will forget what you did,  
but people will never forget how you made them feel."**

Maya Angelou

