

# Customer Service Update

Committee of the Whole

November 2, 2021

# Customer Service Standard

Provide service excellence at all levels within the City and focus on the key drivers of customer satisfaction to:

- a) Respond and acknowledge receipt of customer contact within a reasonable time frame
- b) Provide accurate information and/or the avenue for the customer to receive it
- c) Provide fair and consistent treatment
- d) Be polite and respectful
- e) Provide a response and ensure completeness of service or request



# Alignment to Strategy - Priorities



Good  
Government

## **Increase efficiency and effectiveness of service delivery**

- Develop and document current levels of service
- Promote continuous improvement to Make It Better in all service areas
- Streamline by-laws, policies and processes

# Alignment to Strategy – Guiding Principles

## Service Excellence

- We serve our community with pride.
- We seek to understand and meet the needs of those we serve within our available resources.
- We are committed to timely, knowledgeable, courteous and fair service.
- We value feedback and use what we learn to Make It Better.

# Update on Case Enhancements

A team was established to review the Case process and possible enhancements.

## Team Members

- LeAnn Donnelly, Manager of Customer Service (Acting)
- Craig Shanks, Director of Community Services
- Chris Moncrief, Application Supervisor
- Brenda Stonehouse, Strategy and Innovation Specialist

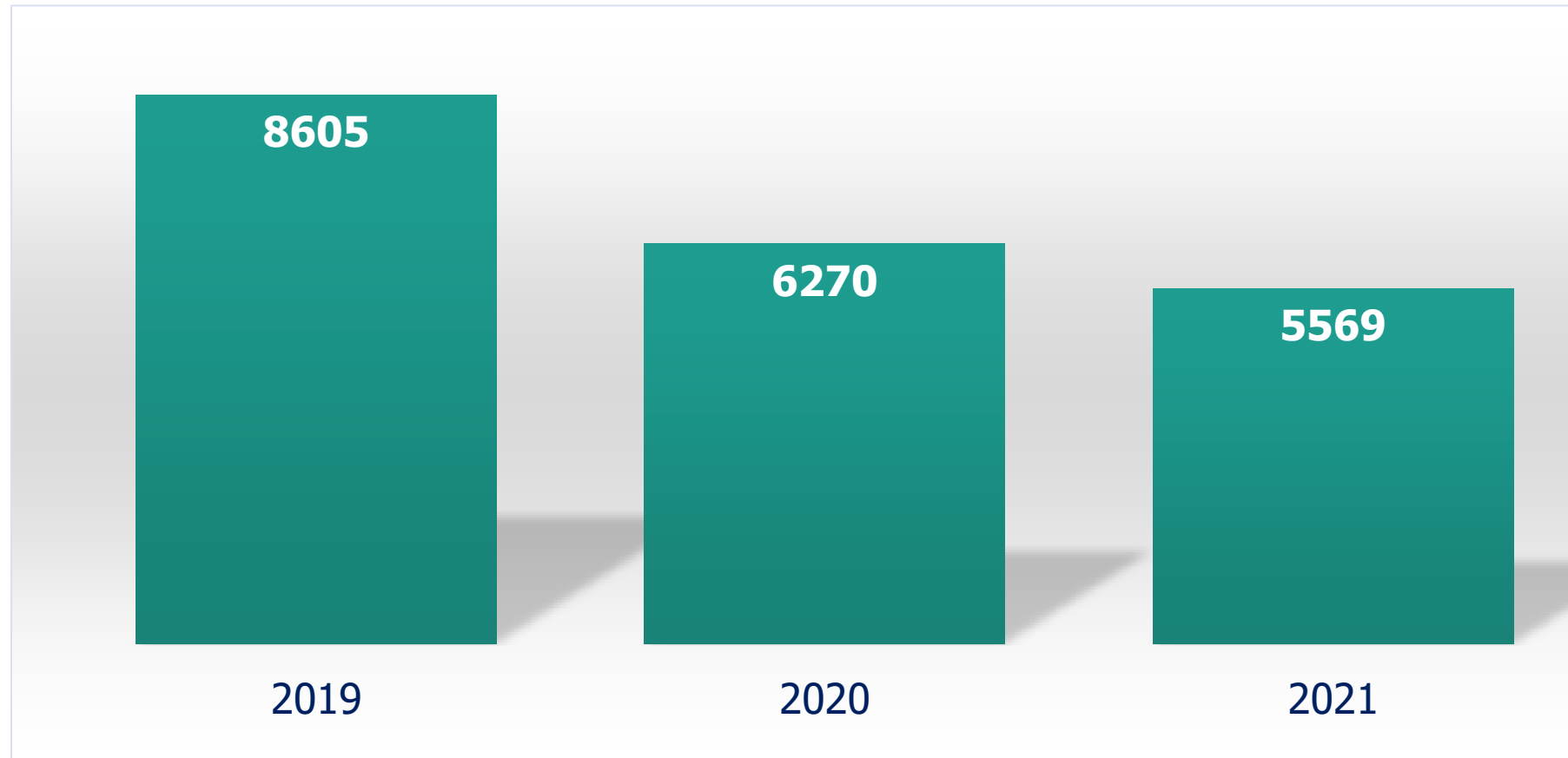
# Using Case at Kawartha Lakes

In 2017 the City of Kawartha Lakes began using the JDE Case Management System by the following divisions:

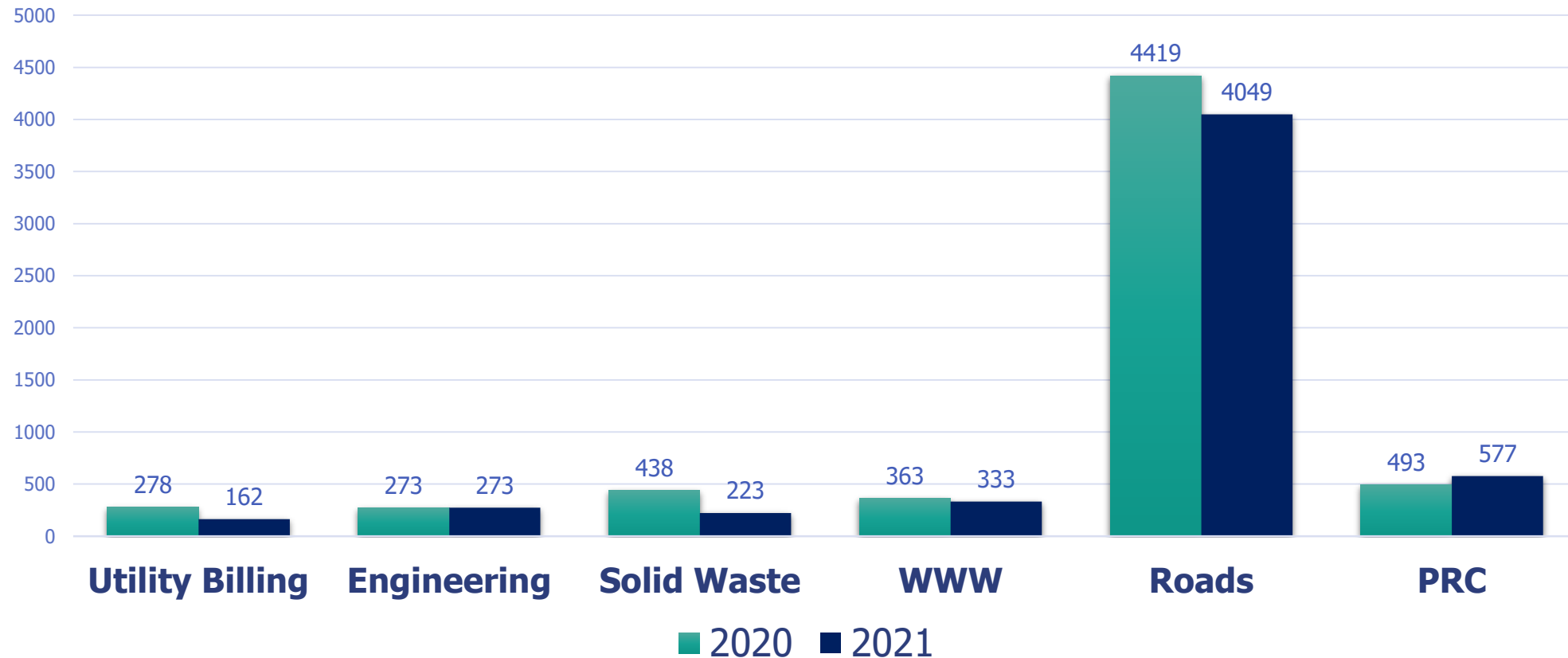
- Utility Billing
- Engineering
- Public Works – Roads, Solid Waste, Water and Wastewater
- Parks, Recreation, and Culture
- Building and Property
- Customer Services

Note: Kawartha Lakes Human Services also uses JDE Case but under a separate management cover

# Number of Requests per Year



# Number of Cases by Division

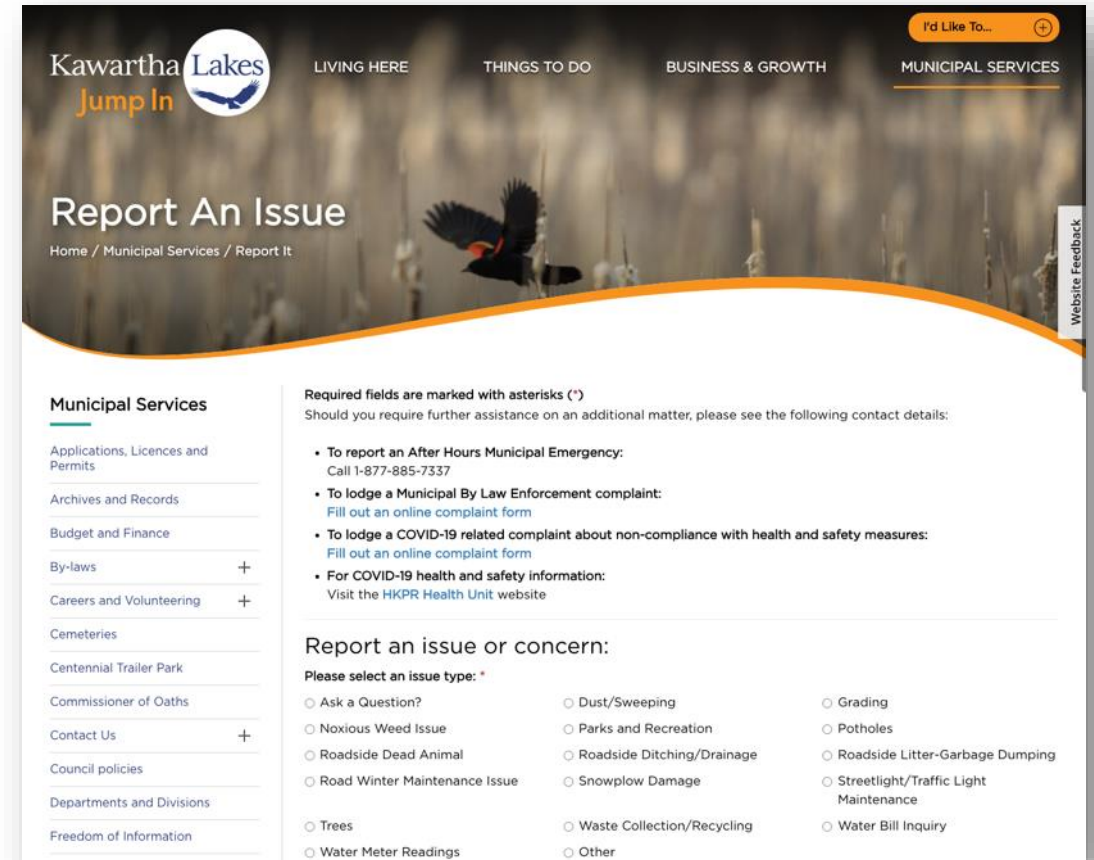




# How we receive Requests

The City receives inquiries, concerns, complaints and compliments via the following portals:

- Phone: Municipal Call Centre
- Walk In: 4 Service Centres
- Report It: Website direct entry which is integrated into JDE



The screenshot shows the 'Report An Issue' page on the Kawartha Lakes website. The header includes the 'Kawartha Lakes Jump In' logo and navigation links: 'LIVING HERE', 'THINGS TO DO', 'BUSINESS & GROWTH', and 'MUNICIPAL SERVICES'. A 'Report An Issue' banner features a bird in flight. Below the banner, a 'Municipal Services' sidebar lists various services like 'Applications, Licences and Permits', 'Archives and Records', 'Budget and Finance', 'By-laws', 'Careers and Volunteering', 'Cemeteries', 'Centennial Trailer Park', 'Commissioner of Oaths', 'Contact Us', 'Council policies', 'Departments and Divisions', and 'Freedom of Information'. The main content area, titled 'Report An Issue', includes a breadcrumb trail 'Home / Municipal Services / Report It', a 'Required fields are marked with asterisks (\*)' note, and a list of instructions for reporting issues. It also features a 'Report an issue or concern' section with a 'Please select an issue type: \*' dropdown and a grid of radio button options for various issues.

**Municipal Services**

- Applications, Licences and Permits
- Archives and Records
- Budget and Finance
- By-laws +
- Careers and Volunteering +
- Cemeteries
- Centennial Trailer Park
- Commissioner of Oaths
- Contact Us +
- Council policies
- Departments and Divisions
- Freedom of Information

**Report An Issue**

Home / Municipal Services / Report It

Required fields are marked with asterisks (\*)

Should you require further assistance on an additional matter, please see the following contact details:

- To report an After Hours Municipal Emergency:  
Call 1-877-885-7337
- To lodge a Municipal By Law Enforcement complaint:  
[Fill out an online complaint form](#)
- To lodge a COVID-19 related complaint about non-compliance with health and safety measures:  
[Fill out an online complaint form](#)
- For COVID-19 health and safety information:  
Visit the [HKPR Health Unit](#) website

**Report an issue or concern:**

Please select an issue type: \*

<input type="radio"/> Ask a Question?	<input type="radio"/> Dust/Sweeping	<input type="radio"/> Grading
<input type="radio"/> Noxious Weed Issue	<input type="radio"/> Parks and Recreation	<input type="radio"/> Potholes
<input type="radio"/> Roadside Dead Animal	<input type="radio"/> Roadside Ditching/Drainage	<input type="radio"/> Roadside Litter-Garbage Dumping
<input type="radio"/> Road Winter Maintenance Issue	<input type="radio"/> Snowplow Damage	<input type="radio"/> Streetlight/Traffic Light Maintenance
<input type="radio"/> Trees	<input type="radio"/> Waste Collection/Recycling	<input type="radio"/> Water Bill Inquiry
<input type="radio"/> Water Meter Readings	<input type="radio"/> Other	

# Customer Service Standard and JDE Case

The Case Management System allows us to manage our Customer Service Requests in accordance with our Customer Service Standards by enabling us to:

- Collaborate with the public and internal staff by assigning, communicating, tracking, and responding to Customer Service Requests
- Continue to improve our assets and services in response to requests
- Find innovative ways to use JDE Case to enhance the customer experience.

# JDE Case Process

1. Call is received by staff and a Case is created.  
Case is sent to appropriate department.
2. Assigned staff assess what needs to be done with issue and reassigns or takes action.
3. Staff update Case status and information as needed while resolution is in progress.
4. When a case is completed staff enter information into notes and close the Case.
5. Departments review Cases monthly to monitor issues and ensure Cases are closed in a timely manner.

# Consultation

- A team was established to look at ways to maximize the JDE system and what enhancements could be made to best serve our customers
- Met with all departments using Case to understand their experiences, concerns and suggestions for improvement
- Explored a number of possible changes to JDE Case
- Worked with Mid-Range to make the changes



# Changes to Case

Through consultation with departments and with feedback from City Council the following changes were made to enhance how we use Case.

1. Automatic Notifications
2. Case Status
3. Updated Training

# Automatic Notifications – Change 1

## Problem

- Residents were given their tracking number over the phone when they called in for their issue. They often didn't write it down so if they called back staff would have to search for it. Often there would be a duplicate case entered if the original case wasn't found.

## Solution

- Upon completion of the original case entry an automatic email notification is now sent to the resident.

Thank you for contacting the City of Kawartha Lakes. Your issue has been submitted for review and your case reference number is 123456.

# Automatic Notifications – Change 2

## Problem

- Residents were not always informed that their case was closed. Staff often filled out the notes and closed the case but the resident wasn't notified.

## Solution

- When closing a case JDE automatically defaults to send a closure notification by email. This field can be 'unchecked' so that a notification is not sent for cases that may not warrant it.

Please be advised that case number 123456 has been resolved. If you require further information please contact a Customer Service Representative by calling 705-324-9411 and pressing 0.

## Problem

- Cases were often left open for a long period of time. When staff would look up the case for a resident there was no indication that any action had been taken.

## Solution

- The status options were changed to better manage the progress and to provide more information to the resident on the actual status of their case



# Modified Case Status

Previous Status Options	Modified Status Options
100 - Open	100 - Open
200 – In Progress	200 – In Progress
300 – On Hold	300 – Under Review
400 – Budget Consideration	400 – Budget Consideration
800 – Cancelled	500 – Long Term Project
900 - Closed	800 – Cancelled
	900 - Closed

# Updated Training

- New training manual created and staff from various divisions tested the document
- A Standard Operating Procedure (SOP) for JDE Case Operations was developed to help staff know when to create or close a case, and a list of resources for further information
- Additional training is also available as needed



# Reporting

In order to manage cases and ensure timely closures the following reporting options are available for staff:

1. Subscribed reporting through Reports Now
2. Search functions through JDE Case
3. JDE E1 pages



# Subscribed Reporting

- Through Reports Now staff can subscribe to receive a report directly in their inbox listing the open cases for a specific provider group listed by assignee number.
- This report can be emailed as frequently as required and allows staff to see all the information on their open cases.

Open\_Cases\_for\_Provider\_Group\_900018\_PRC\_18313029422.pdf - Adobe Acrobat Reader DC (32-bit)

Home Tools Open\_Cases\_for\_Pro... x

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City of Kawartha Lakes  
Case Management  
Open Cases for Provider Group 900018 PRC  
by Assignee #

7/2/2021

Assignee/Assignee	Transaction Date	Case Number	Case Status	Case Description	Call Back Y/N	Facility Description	Failure Location Address	Failure Town/City	Text Notes
328155									
Davidson, Shaun	9/22/2018	63600	200	In Progress		URBAN STREET TREES-LINDSAY		2 HUTTON RD LND	Lindsay
									<p>02/09/2021 10:38:00 LDUNN 23 Eastern Time (US &amp; Canada)</p> <p>01/08/2021 08:51:00 LDONNELLY 23 Eastern Time (US &amp; Canada)</p> <p>01/08/2021 08:51:00 LDONNELLY 23 Eastern Time (US &amp; Canada)</p> <p>100 Open 200 In Progress</p> <p>01/08/2021 08:44:00 RSMITH 23 Eastern Time (US &amp; Canada)</p> <p>100 Open 200 In Progress</p> <p>To be replaced winter 2021</p> <p>04/11/2018 14:08:00 KAJONES 23 Eastern Time (US &amp; Canada)</p> <p>08/21/2017 10:23:00 JBROCHER 23 Eastern Time (US &amp; Canada)</p> <p>After planted a tree on property a few years ago but the tree is getting on a bit, wanted to get it to not looking like the others. It is skinny and not bud going on with it, might want to consider new tree, thanks</p>
Davidson, Shaun	4/13/2018	87440	200	In Progress		URBAN STREET TREES-LINDSAY		8 MELBOURNE DR E	Lindsay
									<p>02/09/2021 15:47:00 LDUNN 23 Eastern Time (US &amp; Canada)</p> <p>02/03/2021 12:09:00 RSMITH 23 Eastern Time (US &amp; Canada)</p> <p>100 Open 200 In Progress</p> <p>Re-planted to S. Davidson to make if tree was damaged</p> <p>04/13/2018 11:32:00 DWIER 23 Eastern Time (US &amp; Canada)</p> <p>04/13/2018 11:25:00 BLOMS 23 Eastern Time (US &amp; Canada)</p> <p>100 Open</p> <p>Carly called to follow up on case 81147 which was closed. She is still wondering if she can have input into the choice of trees. She understood what get for pick) that will be replanted and she also wondered when this would occur</p>
Davidson, Shaun	9/20/2018	92500	200	In Progress		URBAN STREET TREES-LINDSAY		11 Victoria St. North	Lindsay
									<p>02/03/2021 13:32:00 RSMITH 23 Eastern Time (US &amp; Canada)</p> <p>02/03/2021 13:32:00 RSMITH 23 Eastern Time (US &amp; Canada)</p> <p>100 Open 200 In Progress</p> <p>02/03/2021 13:32:00 RSMITH 23 Eastern Time (US &amp; Canada)</p> <p>08/21/2018 09:54:00 DWIER 23 Eastern Time (US &amp; Canada)</p> <p>08/21/2018 08:40:00 TMCCLUAIG 23 Eastern Time (US &amp; Canada)</p> <p>08/21/2018 11:04:00 TMCCLUAIG 23 Eastern Time (US &amp; Canada)</p> <p>100 Open</p>

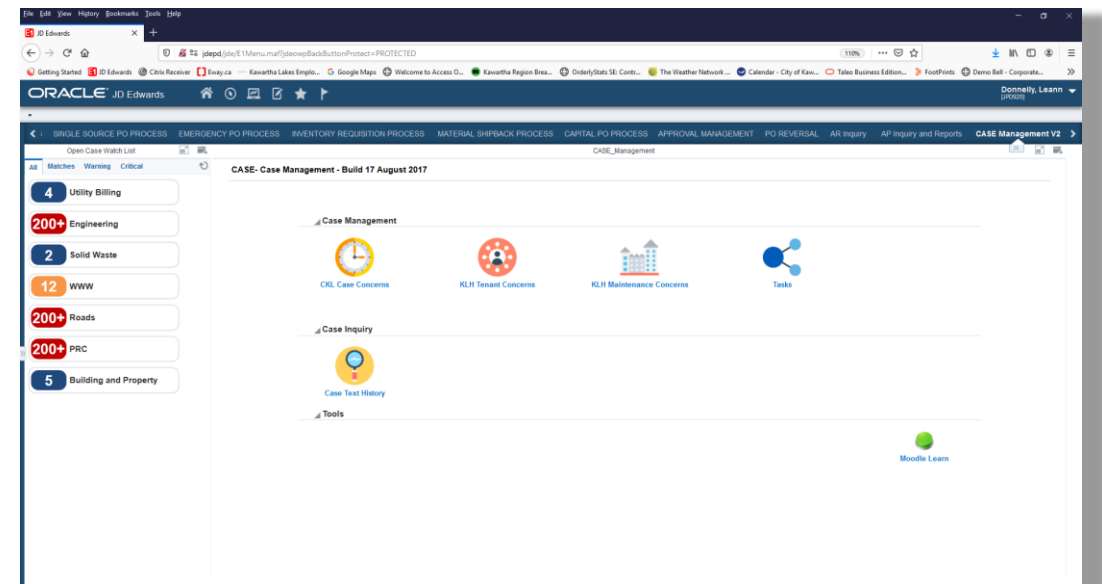
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# Searching Case numbers through JDE

- Through JDE Case staff can use the fields to search cases by status, caller contact name, address, city, assignee, date, or other available fields.
- This information can then be exported into excel to view, filter, and track as needed.
- This allows reporting on all cases entered to a specific contact (for example cases requested by a Councillor), or cases entered on a specific street or area.

# JDE E1 Pages

- Our JDE E1 pages shows the number of open and in progress cases for each area. Staff can select the appropriate division to be redirected to a list of all open or in progress cases for that area. This information can be sorted further and exported to excel to allow staff to manage their open cases.



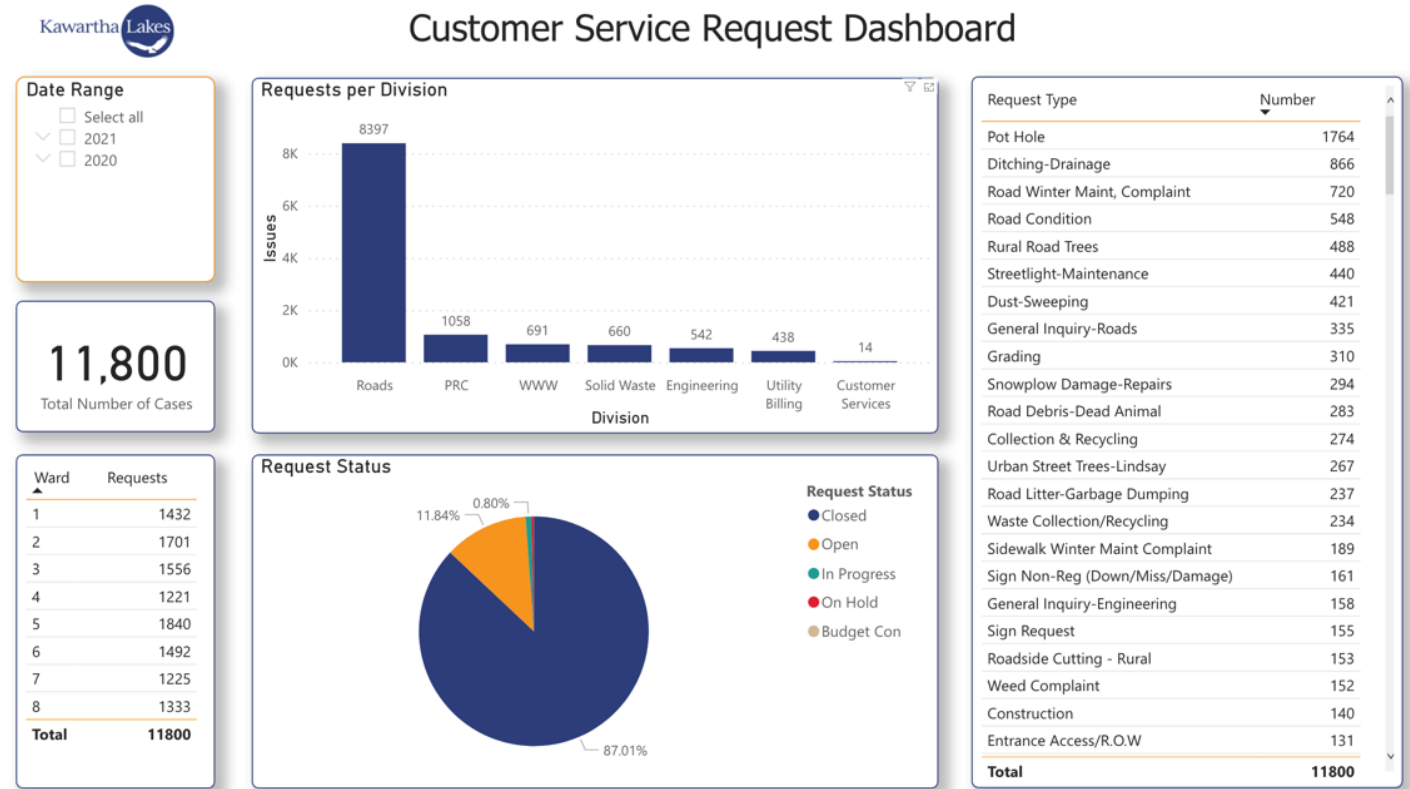
# Visualizing the Data

- Wanted to share the data with staff and the public
- Ensures transparency and accountability
- Needed to be easy to use and understand
- Had to determine what would be most useful and how it was best visualized



# Dashboard

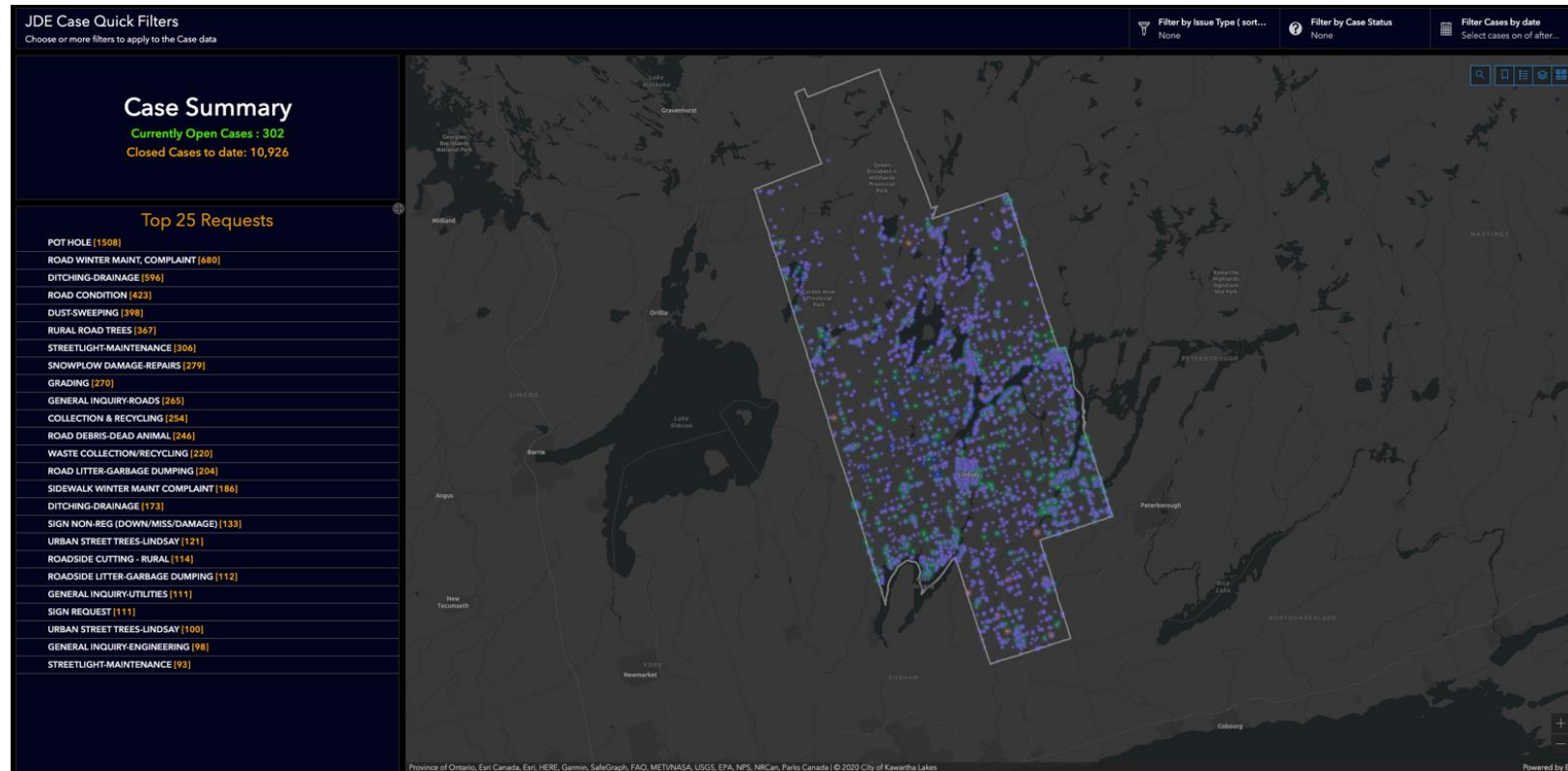
- Created in Microsoft Power BI using Case data
- Can filter by date, division, status, type, or ward





# Map

- Integration with GIS through ESRI



# Municipal Law Enforcement and Licensing

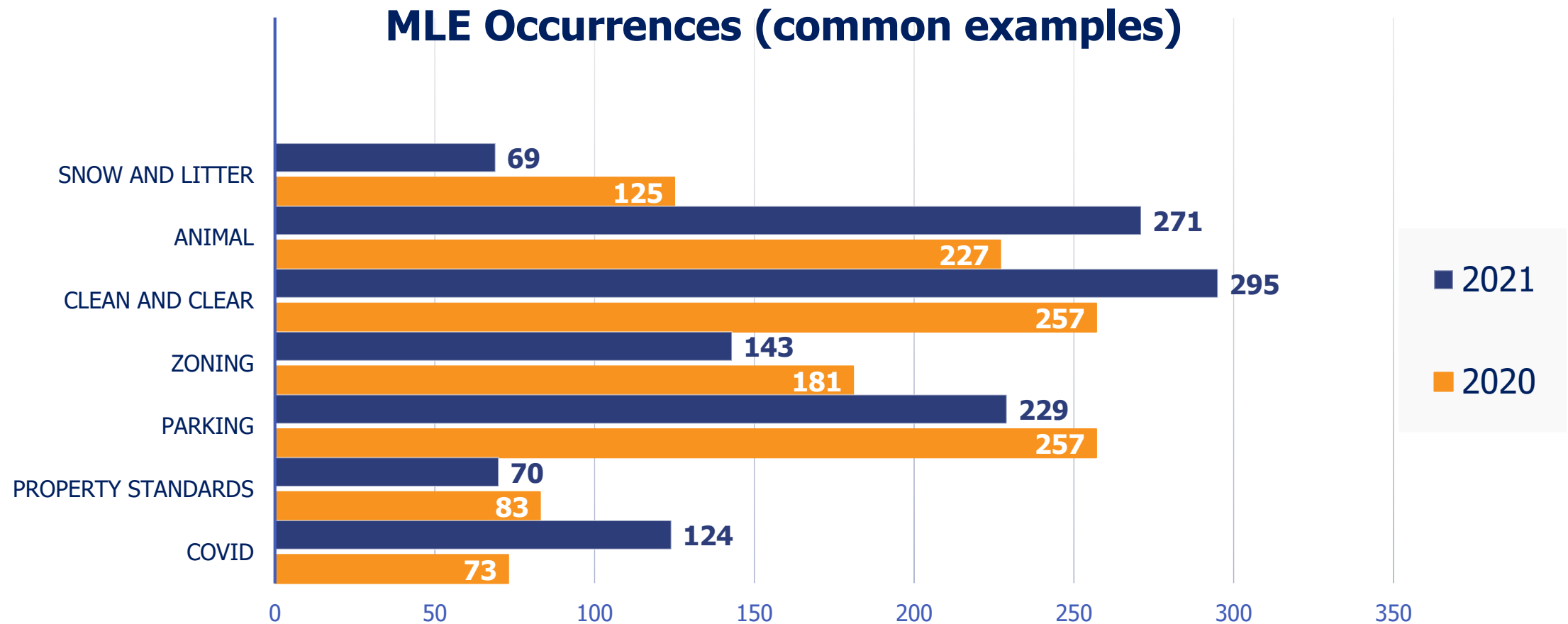
- Services include public education and compliance based enforcement of municipal by-laws and some provincial legislations including:
  - Covid 19 regulations
  - Parking Enforcement (includes Community Liaison Officer LDBIA)
  - Licensing (application processes and enforcement)
  - Animal Control
- Staff include 1 AA, 1 MLEL, 1 Senior Licensing Officer (SLO Clerical) and 8 MLE Officers

# How complaints are received

- MLEL administration receive complaints/queries by telephone, email in person and on-line web form.
- Occurrences are created and assigned to staff. (MLEL office is currently closed to public entry)
- In **2020**, MLEL received 3783 telephone calls, busiest months June - 432 and Aug. – 641 (excludes online and email)
- In **2021**, MLEL received 4346 (extracted October) telephone calls, busiest months June - 813 and August – 605

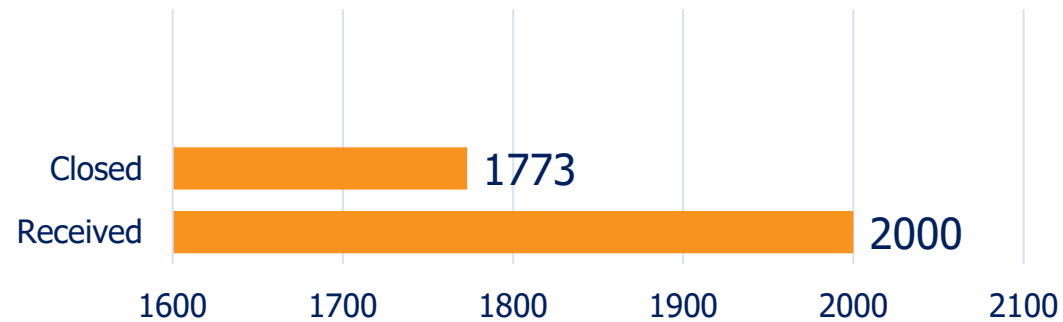
# MLE Occurrences

- MLEL uses CityWorks to track their cases/occurrences

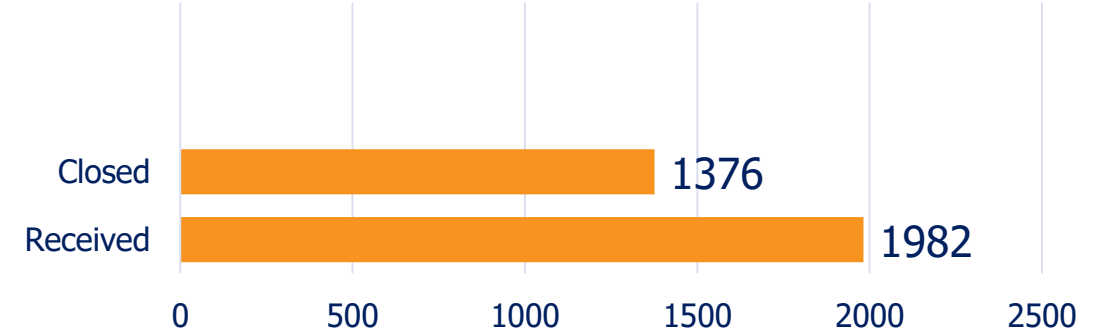


# Municipal Law Enforcement occurrences

**2020**



**2021 to October**



# Next Steps

- Continuous Improvement
- Publish dashboard and map publicly
- Regular audits of process
- Refine process as needed
- Refresh our customer service standard

