



Committee of the Whole Report

Report Number: CS2025-004

Meeting Date: March 4, 2025

Title: 2024 Annual Update – Customer Service Division

Author and Title: Brandon Clarkson, Manager of Customer Service

Recommendation(s):

That Report CS2025-004, **2024 Annual Update – Customer Service Division**, be received; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

Department Head: _____

Financial/Legal/HR/Other: _____

Chief Administrative Officer: _____

Background:

The Customer Service Division is committed to providing high-quality, accessible, and efficient service to residents, businesses, and visitors. To ensure accountability and continuous improvement, annual updates from the Customer Service Division are presented to Council outlining divisional priorities, achievements, and performance measures.

Following a temporary pause during the COVID-19 pandemic, Council reaffirmed the importance of regular reporting from the Customer Service Division at the Council Meeting on June 20, 2023. The first post-pandemic annual update, Report CS2024-003, was presented at the Committee of the Whole Meeting on March 5, 2024, highlighting key service improvements and modernization initiatives. Additionally, at the Committee of the Whole Meeting on February 6, 2024, staff introduced Report CS2024-001, Customer Experience Strategy, establishing priorities for service enhancements and performance measurement for the Customer Service Division.

This report provides an overview of 2024 divisional activities, key service improvements, and future initiatives, ensuring that customer service delivery remains efficient, responsive, and aligned with the City's broader strategic priorities.

Rationale:

The purpose of this report is to provide an annual update on the Customer Service Division's activities, achievements, and ongoing initiatives, ensuring continued alignment with the City's commitment to service excellence, efficiency, and accessibility. As the first point of contact for many residents, businesses, and visitors, the Division plays a critical role in delivering high-quality customer service across multiple service channels, ensuring that municipal services are easily accessible and inquiries and service requests are addressed efficiently.

The Division has continued to evolve, incorporating digital transformation, process improvements, and strategic resource allocation to enhance customer interactions. This report highlights the Division's operational functions, service channels, and key initiatives undertaken in 2024 to improve responsiveness and overall customer experience.

Customer Service Division Overview

The Customer Service Division provides a centralized service model to ensure residents can access municipal information and services efficiently. The Division is responsible for:

- Providing general information on City services and municipal operations.
- Processing financial transactions.
- Managing service requests and ensuring appropriate follow-up with City Divisions.
- Supporting digital service expansion through self-service tools and technology enhancements.
- Coordinating service requests to ensure seamless communication between residents and City Divisions.

The Division operates through multiple service channels, including Municipal Service Centres, the Municipal Call Centre, and online platforms, ensuring accessibility for all residents, businesses, and visitors requiring service from the City.

Municipal Service Centres

The City operates four Municipal Service Centres, located in Lindsay, Bobcaygeon, Omemee, and Coboconk, providing in-person customer service for a wide range of municipal transactions and inquiries. Services include tax and utility payments, licensing and permits, transit passes, sale of waste tags and bulk water services, commissioning of documents, and general municipal inquiries.

Each location is staffed by Customer Experience Representatives who provide face-to-face support, ensuring residents receive accurate information and assistance in navigating municipal services.

In 2024, the Division focused on enhancing service accessibility by reallocating staffing levels across Service Centres to maintain consistent support and optimize service accessibility. The Coboconk Service Centre reopened in July 2024, improving customer accessibility, experience, and enhancing service delivery. Similarly, work is underway to modernize the Lindsay Service Centre (located in City Hall) with the same objectives, with completion anticipated in March 2025.

Municipal Call Centre

The Municipal Call Centre serves as the primary contact point for phone-based inquiries, managing a high volume of calls annually. Community members rely on the Call Centre for assistance with a wide range of municipal inquiries and service requests.

In addition to addressing inquiries directly, the Call Centre plays a key role in routing calls to the appropriate City Divisions for resolution. To enhance efficiency and improve first-contact resolution, the Division collaborated with the IT Division in 2024 to refine the City's call menu and Interactive Voice Response (IVR) system. These enhancements have streamlined call routing, ensuring more inquiries are resolved at the first point of contact and minimizing unnecessary call transfers.

Online Services

The City provides a range of online services to assist customers in conducting business with the City efficiently. The Customer Service Division supports community members by offering guidance on account setup, application submissions, and troubleshooting to ensure seamless access to these digital services.

Report It:

Residents can access a variety of municipal services through the City's online Report It! tool, which allows for direct inquiries, service requests, and feedback submission. This platform offers a convenient alternative to in-person and phone inquiries, allowing community members to access City services at their convenience, anytime and anywhere.

Online Transactions:

The City also provides online sales for curbside collection materials and animal tag registration, giving residents the flexibility to complete these transactions conveniently from home.

Customer Service Support for Public Portals:

The Customer Service Division assists residents who require help navigating City online portals, including applying for Kawartha Lakes Fire Rescue Service (KLFRS) burn and fireworks permits and various road operations permits through the City's digital platforms.

Public Access Kiosks for Online Services:

Public Access Kiosks were identified as an important resource for residents needing assistance with online municipal services. However, a review of their functionality, conducted in collaboration with the IT Division, highlighted the need for improvements. As a result, a redesigned Public Access Kiosk model will be piloted soon to enhance usability, accessibility, and the overall customer experience.

Digital Service Insights:

To further enhance digital service accessibility, the Customer Request Dashboard and Customer Request Map, available on the City's website, provide real-time insights into service requests. These tools allow residents to monitor trends, filter cases by various criteria, and gain insights into citywide service activity and trends.

Service Request Management

The Customer Service Division facilitates service request management, ensuring service requests are accurately logged, assigned, and tracked for timely resolution. While the JDE Case Management System is used for tracking requests across several City Divisions, including Roads Operations, Parks and Recreation, Engineering, Solid Waste, and Water and Wastewater Services, many City Divisions operate through their own preferred systems. In such cases, Customer Service directs requests to the appropriate Division using their preferred systems or applications.

Customer Service also plays a key role in supporting residents throughout the service request lifecycle, providing updates, checking statuses, and assisting with follow-ups to improve transparency and resolution times.

Enhancing Service Request Management Through the CSS and CES:

In 2024, the City initiated efforts to develop the Customer Experience Strategy (CES) and update the Customer Service Strategy (CSS) as part of a structured approach to enhancing customer service delivery.

As part of this work, a key priority was identified to enhance service request management by addressing tracking limitations, ensuring alignment across divisional systems, and improving coordination between Customer Service and operational Divisions to support transparency and accountability in response times and resolution efficiency.

CRM System Review:

As part of the City's ongoing efforts to refine service delivery, work began in 2024 to assess the effectiveness of the current Customer Relationship Management (CRM) system, JDE Case Management System, as feedback was gathered for the Customer Service Strategy (CSS) update. In Q2 2025, the City will conduct review of the CRM system to evaluate its limitations, including adoption challenges, data tracking deficiencies, and overall usability. This evaluation will inform recommendations for either system enhancements or a potential replacement in the City's 2026 budget.

Customer Service Division Service Targets

The Customer Service Division has established service targets as part of its commitment to improving performance measurement and accountability. These targets will be evaluated over time to ensure they align with best practices and evolving service expectations.

Calls Handled by the Municipal Call Centre:

In 2024, a total of 51,886 calls were received through the Municipal Call Centre. Community members rely on the Call Centre for assistance with a wide range of municipal inquiries and service requests.

The Municipal Call Centre operates under established service targets to measure performance and ensure efficient service delivery:

- **Answer Rate (AR%):** Measures the percentage of total incoming calls that were successfully answered. The target is 95% to maintain accessibility and minimize abandoned calls.
- **Service Level (SL%):** Tracks the percentage of calls answered within 30 seconds, with a target of 80% to reduce customer wait times.
- **Average Speed of Answer (ASA):** Measures the average time (in seconds) a caller waits before being connected to a representative, with a target of 20 seconds.
- **Average Call Length:** Represents the typical duration of a call, displayed in minutes and seconds (MM:SS), providing insight into handling times and call complexity.

The following table provides a detailed breakdown of call volumes and key service targets for 2024.

| Month | Total Calls | Calls Answered | Calls Not Answered | AR% | SL% | ASA | Average Call Length |
|--------------|---------------|----------------|--------------------|------------|------------|-------------|---------------------|
| January | 4,185 | 4,128 | 57 | 99% | 91% | 14.4 | 2:33 |
| February | 3,480 | 3,443 | 37 | 99% | 91% | 12.1 | 2:22 |
| March | 3,744 | 3,693 | 51 | 99% | 88% | 14.5 | 2:20 |
| April | 4,775 | 4,676 | 99 | 98% | 85% | 20.3 | 2:18 |
| May | 5,311 | 5,217 | 94 | 98% | 82% | 22.9 | 2:21 |
| June | 5,110 | 5,030 | 80 | 98% | 86% | 17.1 | 2:22 |
| July | 4,889 | 4,808 | 81 | 98% | 87% | 16.6 | 2:20 |
| August | 4,412 | 4,369 | 43 | 99% | 93% | 10.6 | 2:30 |
| September | 3,800 | 3,758 | 42 | 99% | 92% | 11.1 | 2:18 |
| October | 4,327 | 4,280 | 47 | 99% | 93% | 10.9 | 2:18 |
| November | 3,747 | 3,709 | 38 | 99% | 93% | 11.8 | 2:14 |
| December | 4,106 | 4,065 | 41 | 99% | 92% | 11.6 | 2:18 |
| Total | 51,886 | 51,176 | 710 | 99% | 89% | 14.5 | 2:21 |

Transactions Processed at Municipal Service Centres:

Municipal Service Centres processed 17,417 transactions in 2024. These transactions included payments for animal tags, permits, property taxes, utility bills, accounts receivable, licenses, waste tags, transit passes and tokens, bulk water, and document commissioning, as well as the sale of merchandise such as composters, digesters, and rain barrels.

- Utility Billing: 2,249 transactions
- Property Taxes: 7,517 transactions
- Miscellaneous Sales: 7,651 transactions

Total Service Requests Created:

In 2024, a total of 8,476 service requests were created across various divisions, including Road Operations, Parks and Recreation, Engineering, Solid Waste, Water and Wastewater, and Customer Service.

Data collection improvements continue to be a focus, with efforts to refine tracking and introduce additional performance measures where possible. The Customer Service Division will continue monitoring and refining these targets to drive continuous service improvements.

Customer Service Division Priorities for 2025:

As the Customer Service Division continues to prioritize innovation, efficiency, and accessibility, several key initiatives will be focused on in 2025. These efforts are aimed at enhancing service delivery, improving customer interactions, and supporting the City's broader strategic goals. The following focus areas outline the major priorities for the Division in the coming year:

Self-Service Kiosk Expansion and Improvement:

Continue work with the IT Division on enhancing self-service kiosks at Municipal Service Centres, improving their functionality to better support the customer service experience.

Customer Relationship Management (CRM) System Evaluation:

Complete the review of the current CRM system (JDE Case Management) and assess its limitations. Based on feedback and findings, determine whether to enhance or replace the system in 2026, ensuring it supports effective service request management and customer interactions.

Process Improvement and Standardization:

Finalize the PRIME BPM process mapping for the Division in collaboration with the Strategy and Innovation Division, refining Standard Operating Procedures (SOPs) to optimize processes and improve efficiency.

Corporate Customer Service Standards and Customer Experience Strategy:

Launch the Corporate Customer Service Standards (CSS) and continue to implement the objectives identified in the Customer Experience Strategy (CES) implementation roadmap, ensuring cross-departmental alignment and focused initiatives to enhance the overall customer experience across the City.

Performance and Data Tracking:

Further development and refinement of data tracking for key performance indicators (KPIs), including call centre data, service request case creation, transactional data, and in-person service counts.

Focus on improving data accuracy and performance measures to drive decision-making and continuous improvement.

Service Channel Expansion:

Develop and expand additional service channels, including the introduction of an online chat system that allows residents to connect directly with the Customer Service Division and offer residents another way to connect with the City.

Opening of the Modernized Lindsay Service Centre:

The modernized Lindsay Service Centre is set to open in March 2025. This will include optimized space, improved accessibility, and enhanced service delivery, ensuring a better in-person customer experience for residents.

Other Alternatives Considered:

There are no other alternatives considered at this time.

Alignment to Strategic Priorities:

The initiatives undertaken by the Customer Service Division directly support the Good Government priority outlined in the 2024-2027 Kawartha Lakes Strategic Plan, which emphasizes:

- Innovative and efficient service delivery to enhance customer interactions.
- Leveraging digital transformation to improve accessibility and responsiveness.
- Strengthening interdepartmental coordination for a seamless service experience.
- Establishing and tracking key performance indicators (KPIs) to measure service effectiveness.

Financial/Operation Impacts:

There are no financial implications attached to the approval of this report.

Consultations:

N/A

Attachments:

N/A

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