



## Committee of the Whole Report

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**Report Number:** CS2025-003

**Meeting Date:** March 4, 2025

**Title:** Customer Experience Strategy Update

**Author and Title:** Brandon Clarkson, Manager of Customer Service

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### Recommendation(s):

**That** Report CS2025-003, **Customer Experience Strategy Update**, 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:**

At the Committee of the Whole Meeting on February 6, 2024, staff introduced report CS2024-001, Customer Experience Strategy, which marked the initial effort to develop the City's Customer Experience Strategy (CES) and create a structured approach for enhancing customer service delivery. Initially, the CES was a broad concept aimed at enhancing accessibility, transparency, and engagement. However, through further analysis and refinement, the City has shifted towards a more structured and actionable framework that aligns with its strategic objectives.

As part of this evolution, the City is transitioning from a conceptual approach to a structured framework that establishes governance, accountability, and service expectations across all Divisions. This framework consists of three primary components: an overarching Customer Experience Commitment Policy, an operational Customer Experience Strategy, and supporting directives that guide service standards and customer service delivery. This approach ensures a consistent, transparent, and efficient municipal service model that meets the needs of staff, residents, businesses, and visitors.

### **Customer Experience Commitment Council Policy (In Development):**

The Customer Experience Commitment Policy is the City's overarching statement of commitment to service excellence. It provides the foundation for all customer service initiatives, reinforcing a structured and strategic approach to customer experience improvements. This policy establishes the City's service expectations and supports the CES as its operational framework.

### **Customer Experience Strategy (In Development):**

The CES is a framework designed to align City services with community needs by enhancing interactions and fostering positive relationships. It focuses on delivering seamless, accessible, and responsive experiences across all touchpoints with the City. The CES is structured around corporate vision and goals, customer-centric culture, service expectations, customer feedback integration, continuous improvement, and technology and innovation. The CES is comprised of key directives, including:

- **Corporate Customer Service Standards: MD2017-021**
  - The Corporate Customer Service Standards (CSS) establishes clear service expectations, standardized response times, and defined escalation pathways to promote accountability, consistency, and accessibility in customer service across all Divisions.
- **Customer Service Toolkits (In Development)**
  - The Customer Service Toolkits are a collection of resources designed to ensure staff provide clear, timely, and professional service. These toolkits establish standardized procedures, response templates, and best practices for handling inquiries and managing service requests effectively.
- **Customer Conduct Management Directive: MD2024-003**
  - The Customer Conduct Management Directive is a policy that establishes guidelines for maintaining respectful interactions between staff and the public, addressing inappropriate or unreasonable behaviour in a structured manner.
- **Corporate Complaints Handling Council Policy: CP2021-028, MD2016-017**
  - The Corporate Complaints Handling Policy is a framework that outlines a consistent and transparent approach to handling public complaints, ensuring accountability, service quality, and responsiveness.

As part of the City's CES review, a priority was identified to update the 2017 edition of the CSS to reflect evolving service expectations and ensure alignment with the City's broader customer experience initiatives.

In the City's 2016-2019 Strategic Plan, the establishment and execution of Customer Service Standards was identified as one of the City's Top 10 Strategic Priorities. At the June 21, 2016 Special Council Meeting, the outline for the Customer Service Standards was presented, which highlighted the key objectives:

- Provide exceptional customer service and implement a consistent service standard.
- Enhance communications and improve accessibility to government services.
- Promote service excellence by adopting best municipal practices.
- Review operational efficiencies to ensure high quality service delivery.

The CSS were initially brought forward at the January 10, 2017, Council Meeting in report CS2017-002, Customer Service Standards Strategy. These standards were formally implemented on January 1, 2018, alongside **Management Directive MD2017-021, Appendix A**. This edition of the CSS was designed to establish clear, measurable guidelines defining the level of service customers could expect to receive.

Since their inception, the CSS have not been updated, making this revision essential to ensure they remain relevant, adaptable, and aligned with the City's ongoing commitment to service excellence and responsive municipal service delivery. This report addresses these updates by outlining the key changes in the 2025 edition of the CSS and how they support the City's commitment to service excellence.

## **Rationale:**

This report highlights the updates to Management Directive MD2017-021 and the development of the **2025 Corporate Customer Service Standards, Appendix B**, to ensure continued alignment with modern service expectations, operational efficiencies, and the City's broader Customer Experience Strategy. As a foundational directive, the CSS update strengthens service consistency, reinforces accountability, and supports a customer-centric approach across all City Divisions.

The 2025 edition enhances the CSS by introducing Division Service Targets (DST) to provide service flexibility and transparency, clear escalation pathways for issue resolution, and standardized response timelines to promote consistency across all Divisions. This report highlights the key components of the updated CSS, detailing how these improvements address identified service gaps, enhance transparency, and reinforce the City's commitment to service excellence and continuous improvement. A key focus of this update is making information more available to customers by ensuring an open and transparent approach to the service request lifecycle.

## **Development of the New CES Pillars**

As part of the CES initiative, a cross-departmental Corporate Customer Service Standards Working Group was established to guide the development of the updated CSS. This group provided key insights into service gaps, best practices, and strategic priorities, ensuring the new standards reflect the operational realities of all Divisions. Through collaboration, the working group refined the scope of the CSS and restructured its components, shifting certain elements into specialized directives like the Customer Service Toolkits and Customer Conduct guidance, ensuring these elements can be updated efficiently as service needs evolve.

## **Work Completed to Update the CSS**

The process of updating the CSS was driven by the need to modernize service expectations, address operational challenges, and ensure alignment with the broader

CES. This revision built upon the foundations of the 2017 CSS while integrating refinements based on operational feedback and emerging best practices. The Corporate Customer Service Standards Working Group played a central role in evaluating service gaps, identifying necessary improvements, and ensuring that the updated standards support a consistent and responsive customer experience across all City Divisions. The following key updates were identified:

- **Division Service Targets (DST):** Providing service flexibility across Divisions while maintaining consistency.
- **Clear Escalation Pathways:** Strengthening issue resolution and ensuring timely responses.
- **Standardized Response Times:** Promoting transparency and setting clear expectations for service delivery.
- **Refinements Based on Stakeholder Engagement:** Integrating feedback from all City Departments and public input to ensure the standards remain relevant, actionable, and effective for City operations.

## Implementation Roadmap

The following roadmap outlines key milestones for the continued development and implementation of the CES ensuring structured improvements to customer service delivery and alignment with the City's broader strategic priorities.

- **Implementation of the 2025 Corporate Customer Service Standards (Q1 2025):** The updated CSS has been developed and is being presented to Council for information, with implementation to follow across all City Divisions.
- **Revision of the Customer Conduct Management Directive (Q2 2025):** Establishing guidelines to ensure respectful and productive interactions between staff and customers.
- **Revision of the Corporate Complaints Handling Council Policy (Q2 2025):** Updating the policy to improve complaint resolution processes and enhance transparency.
- **Investigation and Review of Current Customer Relationship Management (CRM) System (Q2 2025):** Assessing system limitations, including adoption challenges, data tracking deficiencies, and overall usability. Findings will inform recommendations for system enhancements or a potential replacement for consideration in the municipal 2026 budget.
- **Development of the Customer Service Toolkits (ongoing):** Providing staff with practical resources, standardized procedures, best practices, and training to ensure consistent and professional customer interactions.

- **Establishment of the CES Framework (Q1 2026):** A framework to align City services with community needs by enhancing interactions and fostering positive relationships. The CES will define service expectations, embed customer-focused processes, and integrate performance tracking to ensure seamless, accessible, and responsive experiences across all touchpoints
- **Creation of the Customer Experience Commitment Council Policy (Q1 2026):** A policy that formalizes the City's overarching commitment to service excellence and provides the foundation for all customer service initiatives within the CES.
- **Creation of Division Service Targets (Q1 2026):** Defining measurable service targets for each Division to ensure consistency, accountability, and alignment with overall customer service standards.

### **Other Alternatives Considered:**

The City could have chosen to continue using the 2017 edition of the CSS without modifications. However, updating the CSS ensures alignment with the City's ongoing commitment to service excellence and responsiveness to evolving customer needs. The revised CSS integrates structured service expectations and operational improvements to better support staff and enhance the customer experience. Maintaining the 2017 version would not reflect the City's focus on continuous improvement and alignment with the 2024-2027 Strategic Plan.

### **Alignment to Strategic Priorities:**

The 2025 CSS supports the City's 2024-2027 Strategic Plan, reinforcing the City's mission to provide high-quality, transparent, and efficient municipal services. This standard fosters the core values of accountability, respect, and teamwork, ensuring a consistent and equitable approach to customer service across all City Divisions.

Furthermore, the CSS contributes directly to the City's guiding principle of service excellence, reinforcing service standards and operational guidelines that promote positive interactions with residents, businesses, and visitors. It directly advances the Good Government priority by:

- Defining clear service expectations and response protocols to ensure consistent service interactions.
- Utilizing data-driven performance monitoring to enable continuous improvement and informed decision-making.

- Establishing Division Service Targets (DST) to tailor service expectations to various municipal functions while maintaining consistency.

### **Financial/Operation Impacts:**

The City will conduct a thorough review of its current CRM in Q2 2025 to assess its limitations, including adoption challenges across Divisions, difficulties in obtaining meaningful performance data, and limited functionality that impact both staff operations and customer interactions. Following the review, a proposal will be developed for either enhancement or replacement of the CRM in the City's 2026 budget.

### **Consultations:**

Chief Administrative Officer

Senior Management Team

Corporate Customer Service Standards Working Group

### **Attachments:**

Appendix A – Draft MD2017-021: Corporate Customer Service Standards



MD2017-021 -  
Corporate Customer

Appendix B – Draft Corporate Customer Service Standards



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