



Council Report

Report Number: CS2025-008

Meeting Date: July 22, 2025

Title: Deputy Mayor's Customer Service Initiative

Author and Title: Brandon Clarkson, Manager of Customer Service

Recommendation(s):

That Report CS2025-008, **Deputy Mayor's Customer Service Initiative**, be received.

Department Head: _____

Financial/Legal/HR/Other: _____

Chief Administrative Officer: _____

Background:

At the Committee of the Whole Meeting of November 5, 2024, Deputy Mayor McDonald, along with staff, presented an overview of the Deputy Mayor's Customer Service Initiative. The initiative was launched in March 2024 to examine how service requests are managed in high-volume service areas and to identify opportunities to strengthen service consistency, responsiveness, and coordination.

The review included consultation with staff from Engineering, Municipal Law Enforcement and Licensing, Planning, Urban Tree Service, and Roads Operations. Each area provided insight into how service requests are received, triaged, and either resolved directly or forwarded to the appropriate operational staff for follow-up, depending on the nature of the request. The presentation identified several challenges, including the use of multiple tracking systems, difficulty retrieving accurate and timely data, and the need for improved status updates and case management practices in some areas.

Building on the findings of the initiative, staff presented Report CS2025-003 at the Committee of the Whole Meeting of March 4, 2025, outlining the development of the City's Customer Experience Strategy (CES) and the updated Corporate Customer Service Standards (CSS). The foundational work completed by the five original service areas through the Deputy Mayor's Customer Service Initiative contributed to the development of this framework. The observations and practices from that review informed the approach to defining and measuring service expectations, including the introduction of Division Service Targets (DST) to support consistency and transparency across the organization for service request handling.

This report is intended to keep Council informed as this work continues to evolve.

Rationale:

This report provides an update following the November 2024 presentation of the Deputy Mayor's Customer Service Initiative and the March 2025 presentation of Report CS2025-003. It includes a summary of:

- A highlight of improvements observed within the Urban Tree Service area
- Customer Service Division metrics from January to May 2025
- An overview of current limitations with the City's service request management system and planned next steps
- A summary of proposed changes within the Customer Service Division, including structure and naming updates

- Information on how Customer Service supports Members of Council through service request processes and available tracking tools

Urban Tree Service - Demonstrating the Impact of Measurable Service

Targets:

Urban Tree Service was an early example among service areas to demonstrate measurable improvements through a structured approach to establishing service targets for service requests and prioritizing workload using triage protocols. As outlined in the November 2024 Deputy Mayor's Customer Service Initiative presentation, Urban Tree Service committed to the following service targets:

- Immediate Tree Hazards: Addressed within 48 hours
- High Priority Tree Requests: Addressed within 2 weeks, 80% of the time
- Medium Priority Tree Requests: Addressed within 1 month, 80% of the time
- Low Priority Tree Requests: Addressed within 3 months, 80% of the time.

These categories reflect how the service area triages service requests based on potential risk to public safety, infrastructure, or aesthetics. Typical work includes multiple types of pruning, full tree removal, and proactive maintenance of municipally owned trees.

In April 2024, a dedicated Forestry and Horticulture Supervisor joined the Parks and Recreation Division. At that time, there were approximately 300 open urban tree-related service requests in the JDE Case Management System, many of which had not been reviewed for several months prior. Urban Tree Service staff reviewed and completed service requests, sorted remaining cases by date and type, and conducted inspections to prioritize outstanding work. By late June 2024, the number of open cases had been reduced to under 100. By the end of November 2024, all outstanding JDE cases had been addressed, and the service area transitioned to a proactive maintenance model. Residents were notified of pending work through new communication materials, and new service requests were promptly triaged and assigned for follow-up. For several months, the service area consistently met its established service targets.

Although the 2025 ice storm resulted in a significant increase in demand and temporary impacts to response timeframes, Urban Tree Service continues to serve as a model for how clearly defined service targets, active service request oversight, and structured triage processes can improve service delivery.

Customer Service Division Service Targets (January to May 2025):

The Customer Service Division monitors performance across service channels, including the Municipal Call Centre and Municipal Service Centres. DST are used to monitor service levels and ensure consistent handling of inquiries and service requests. These

targets will be evaluated over time to ensure they align with best practices, evolving service expectations, and availability of data.

This section provides a summary of the Division's performance against DST from January to May 2025. Performance measures include call handling indicators, transaction volumes, visitor counts at Service Centres, and service request activity. Comparative data between January to May 2024 and the same period in 2025 are provided where available.

Calls handled by the Municipal Call Centre:

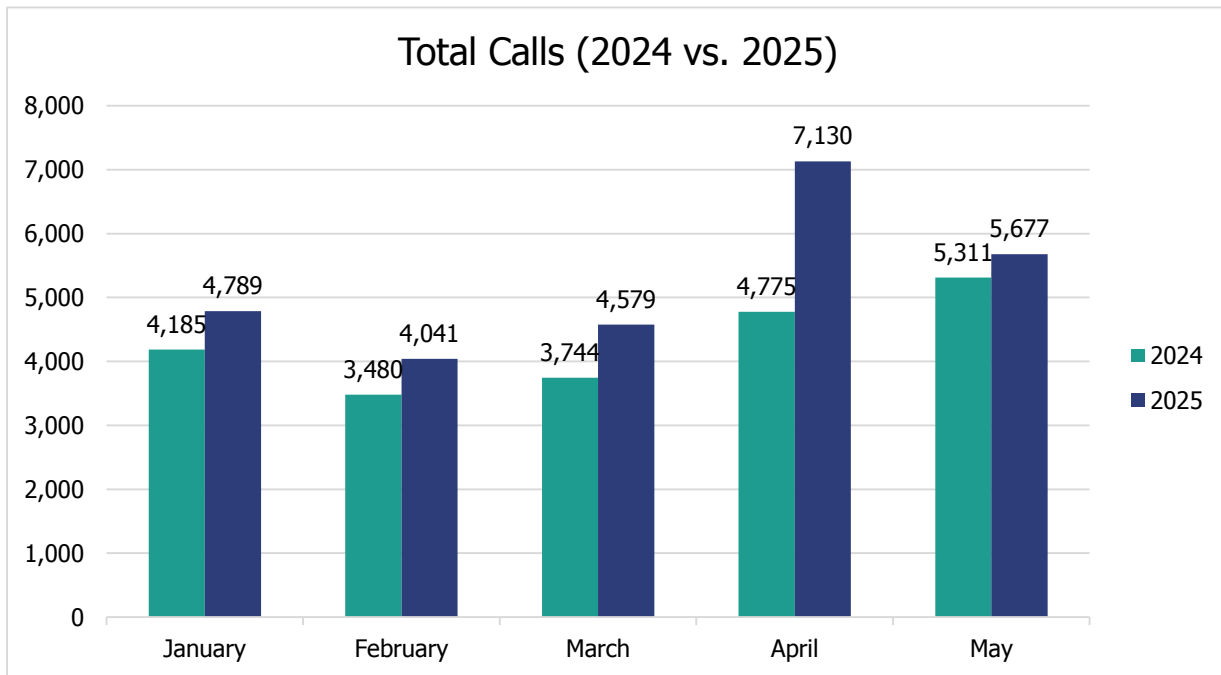
From January to May 2025, a total of 26,216 calls were received through the Municipal Call Centre. Residents rely on the Call Centre for assistance with a wide range of municipal inquiries and service requests.

The Municipal Call Centre operates under the following Division Service Targets:

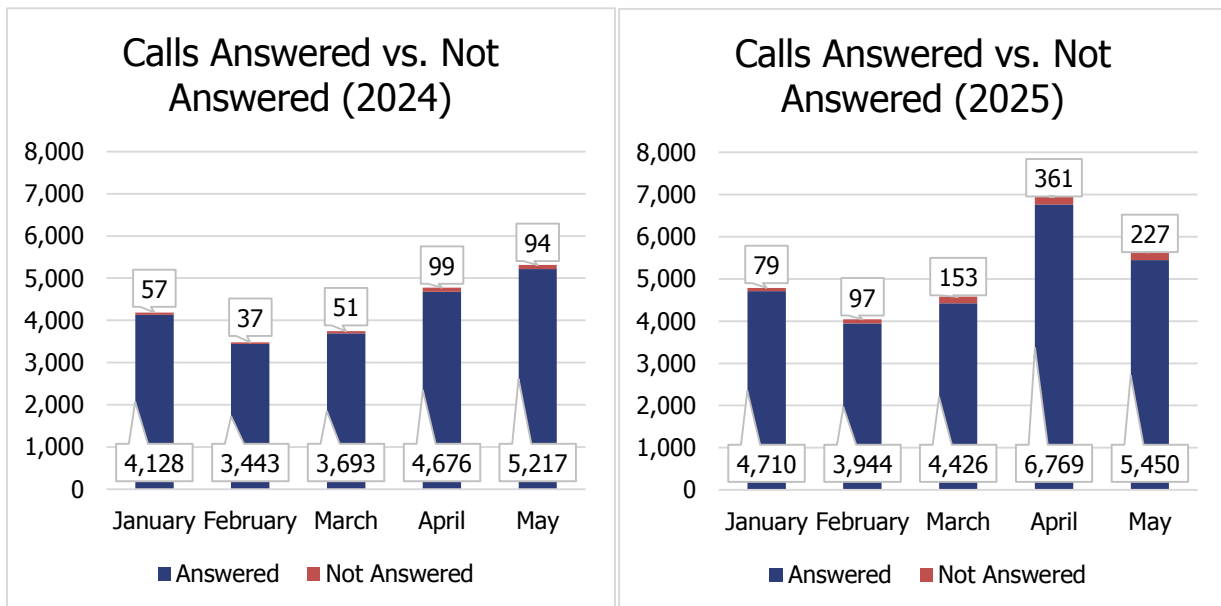
- Answer Rate (AR%): Target of 95%. This measure calculates the percentage of all incoming calls that are successfully answered by the Customer Service Division.
- Service Level (SL%): Target of 80%. This measures the percentage of calls that are answered within 30 seconds of being placed in the Municipal Call Centre queue.
- Average Speed of Answer (ASA): Target of 20 seconds. This is the average time, in seconds, that a caller waits before their call is answered.
- Average Call Length: Informational only. This reflects the average duration of each call and provides general insight into call handling time and inquiry complexity.

The following table and charts provide a detailed breakdown of call volumes and performance against DST from January to May 2025.

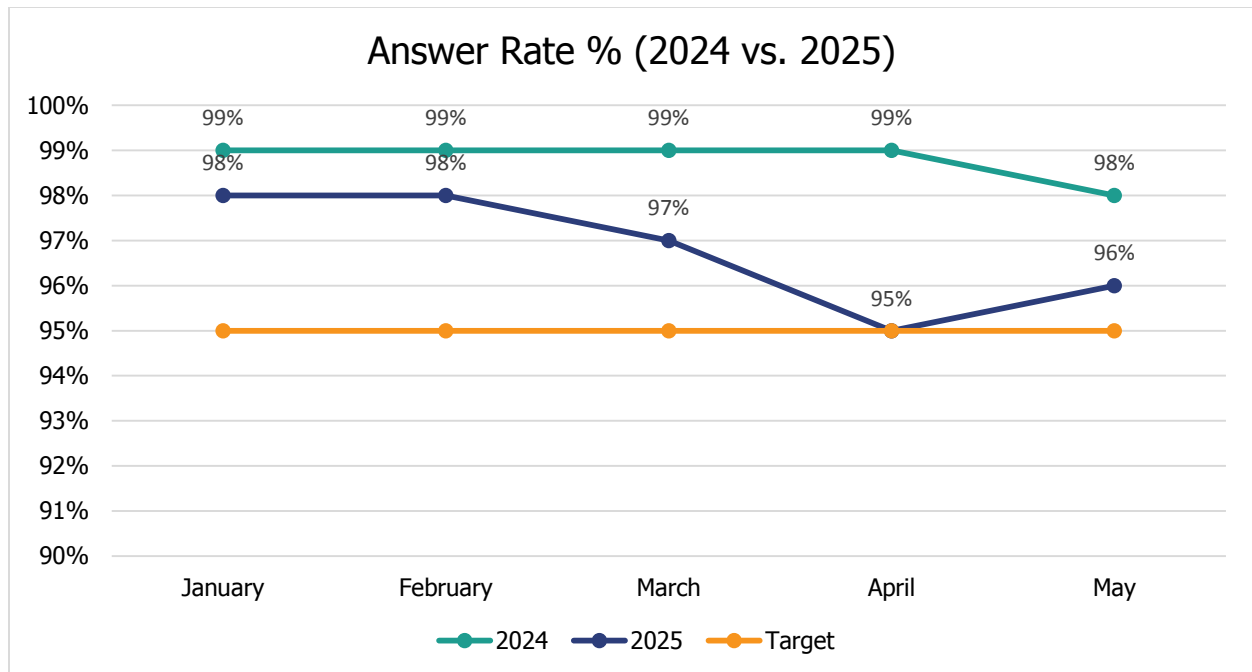
Month	Total Calls	Calls Answered	Calls Not Answered	AR%	SL%	ASA	Average Call Length
January	4,789	4,710	79	98%	90%	14.2	2:44
February	4,041	3,944	97	98%	85%	19.6	2:55
March	4,579	4,426	153	97%	80%	25.9	2:49
April	7,130	6,769	361	95%	70%	42.4	3:03
May	5,677	5,450	227	96%	74%	37.5	3:20
Total	26,216	25,299	917	97%	80%	27.9	2:58



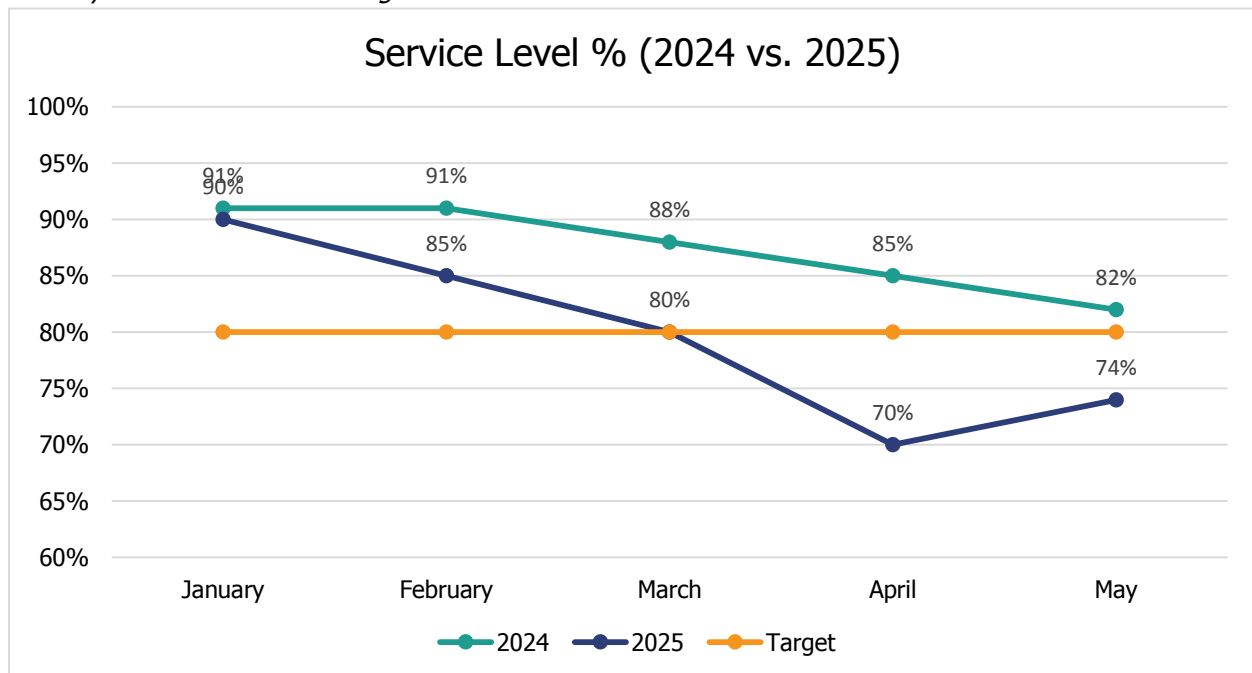
Note: This chart compares the total number of calls received for 2024 and 2025 by month.



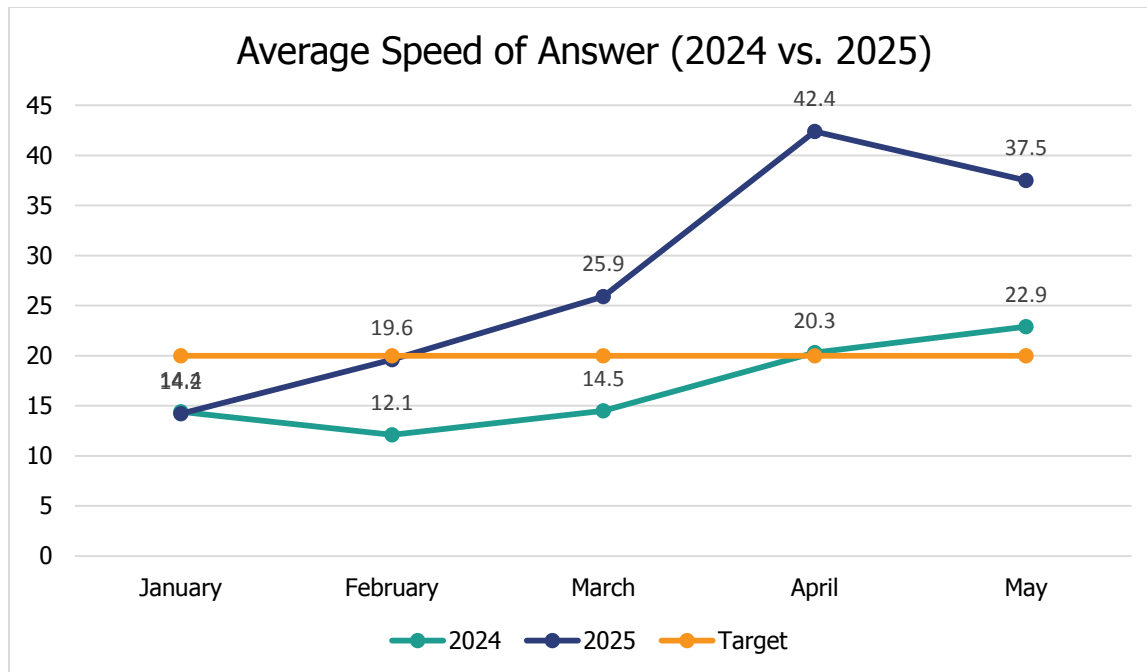
Note: These charts display the number of calls answered and not answered from January to May in 2024 and 2025, respectively.



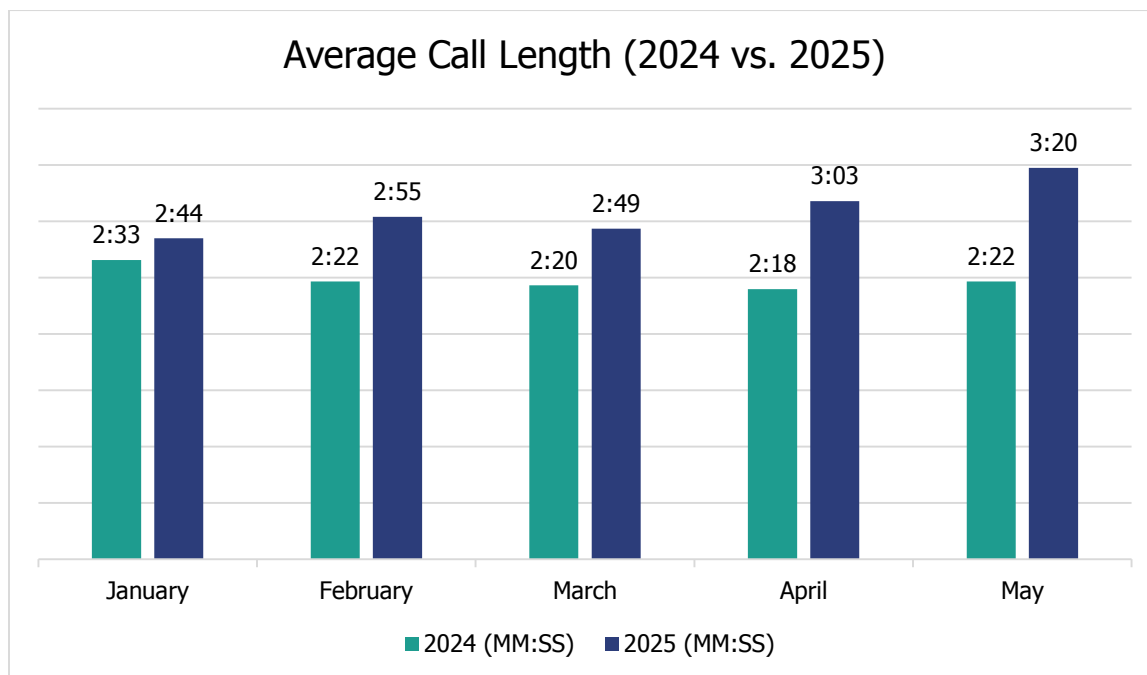
Note: This chart compares the percentage of incoming calls that were successfully answered in 2024 and 2025 by month. The service target is 95%.



Note: This chart compares the percentage of calls answered within 30 seconds in 2024 and 2025 by month. The service target is 80%.



Note: This chart compares the average wait time, in seconds, before a caller was connected to a representative in 2024 and 2025 by month. The service target is 20 seconds.



Note: This chart compares the average duration of answered calls, displayed in minutes and seconds in 2024 and 2025 by month.

Municipal Call Centre performance during this period was influenced by several factors, including reduced staffing levels within Customer Service and a higher volume of weather-related inquiries. The March 2025 ice storm, in particular, contributed to a significant increase in call activity. As a result, performance in some months did not meet established DST.

Overall, the volume of calls received through the Municipal Call Centre increased by 22% as compared to the same period in 2024. This growth underscores the continued reliance of residents on this service channel for timely information and support.

Transactions Processed at Municipal Service Centres:

From January to May 2025, the City's Municipal Service Centres processed a total of 8,215 transactions. These payments included property tax, utility billing, and miscellaneous sales. Some miscellaneous sales were purchased online but were processed by the Customer Service Division at a Municipal Service Centre.

The following table provides a comparison of in-person transactions between January to May 2024 and the same period in 2025:

Transaction Type	2024	2025	Change (#)	Change (%)
Property Tax	3,367	4,048	+681	+20%
Miscellaneous Sales	3,586	3,054	-532	-15%
Utility Billing	869	1,113	+244	+28%
Total	7,822	8,215	+393	+5%

The following table provides the volume and dollar amount of in-person transactions by Municipal Service Centre from January to May 2025.

MSC	Property Tax		Miscellaneous Sales		Utility Billing		Total	
	#	\$	#	\$	#	\$	#	\$
BSC	569	\$583,861	185	\$225,789	241	\$186,753	995	\$996,403
CSC	467	\$331,252	195	\$57,424	37	\$8,771	699	\$397,447
LSC	2,586	\$2,817,017	1,636	\$5,090,871	765	\$377,337	4,987	\$8,285,225
OSC	426	\$372,075	186	\$7,896	70	\$14,988	682	\$394,959
Total	4,048	\$4,104,205	2,202	\$5,381,980	1,113	\$587,849	7,363	\$10,074,034

Note: Municipal Service Centre (MSC), Bobcaygeon Service Centre (BSC), Coboconk Service Centre (CSC), Lindsay Service Centre (LSC), Omeme Service Centre (OSC).

Overall, this represents a 5% increase in total transaction volume compared to the same period in 2024, with notable growth in both property tax and utility billing payments.

In-Person Visits to Municipal Service Centres:

Visitor counts at the City's four Municipal Service Centres are recorded manually by the Customer Service Division. From January to May 2025, 5,357 in-person visits were recorded across all locations. This dataset is being collected for the first time in 2025; historical comparisons are not available.

While the data provides useful insight into service demand and front counter activity, figures may be underreported due to the manual nature of collection. Actual visitor volumes are likely higher.

The following table presents in-person visits by month and Service Centre location:

Month	Lindsay	Bobcaygeon	Coboconk	Omemee	Total
January	496	85	171	127	879
February	795	241	182	168	1,386
March	595	104	85	78	862
April	733	120	210	87	1,150
May	678	109	153	140	1,080
Total	3,297	659	801	600	5,357

Total Service Requests Created:

Between January and May 2025, a total of 4,977 service requests were created across the City. Requests were submitted through various service channels, including online through Report It, by phone, email, and in person, and were assigned to different Divisions for review and action depending on the nature of the request. Service requests are currently tracked in the JDE Case Management System by the following Divisions: Road Operations, Parks and Recreation, Engineering, Solid Waste, Water and Wastewater, and Customer Service.

Overall, this represents a 34% increase in total service request volume compared to the same period in 2024, with notable growth observed in Road Operations (up 26%) and Parks and Recreation (up 92%). It is worth noting that through the immediate response and recovery efforts following the 2025 ice storm, case management processes were temporarily adjusted as Divisions prioritized emergency storm-related service delivery.

Service Request Management – JDE Case and Customer Relationship Management Review:

While the JDE Case Management System remains the City's primary tool for tracking service requests, its effectiveness is limited by inconsistent adoption and outdated functionality. Some service requests are left open or lack detailed resolution updates,

making it difficult to follow the full lifecycle of a service request or report back to residents with confidence.

The system also lacks essential features such as automation, integrated communication tools, and mobile compatibility. These limitations create inefficiencies and hinder timely, transparent service delivery. In many cases, staff rely on manual workarounds and external tracking methods to supplement the system, which impacts accuracy and consistency of data collection.

These challenges were outlined in Report CS2025-004, where staff committed to reviewing options for a modern Customer Relationship Management (CRM) system. Since then, a review has been underway to assess platforms with functionality that better meets the City's needs. Key features under review include centralized customer records, real-time case status updates, automated routing, and enhanced digital self-service tools for residents.

A new CRM system would be implemented corporately across all Divisions that manage public inquiries or service requests, in coordination with the Customer Service Division. It would support consistent intake, clear assignment of responsibility, timely resolution, and reliable reporting. These improvements could also enable the City to build a complete record of customer interactions and measure performance more effectively.

As committed to in Report CS2025-003, work to define and implement corporate Division Service Targets will begin in September 2025, with the goal of completing this work in the first quarter of 2026. The JDE Case Management System does not support the ability to follow the full lifespan of a request or to extract the performance data needed to assess achievement of DST. A recommendation to procure a new CRM system will be brought forward as part of the 2026 City budget.

Enhancing Customer Experience through Changes to Service Delivery and Structure:

To reflect its evolving scope and alignment with best practices in the municipal sector, the Customer Service Division is transitioning to the Customer Experience Division. This change signals a broader commitment to delivering consistent, high-quality customer interactions across all City channels and services. The transition also aligns with naming conventions already in place for position titles within the Division, including Customer Experience Representatives and Customer Experience Specialists. The Manager, Customer Service title will also be updated to Manager, Customer Experience as part of this shift. Naming changes across systems and resources will be introduced over time as part of this transition.

To support the operational needs of the Division, a new position titled Supervisor, Customer Experience has been proposed for inclusion in the 2026 City budget. This role is intended to oversee daily operations, performance monitoring, scheduling, and staff coaching, while also providing additional leadership capacity within the team.

Establishing this role will enable the Manager, Customer Experience to focus more fully on strategic corporate initiatives that support the delivery of a coordinated and responsive customer experience across all Departments. Key responsibilities include leading the implementation of the City's CES, advancing the CSS, and chairing the Corporate Customer Service Standards Working Group. If approved, the Manager will also oversee the onboarding of a new CRM, the development of Customer Service Toolkits, and the rollout of training initiatives that support front-line service delivery.

The CSS introduced formal commitments for regular tracking and reporting to Council and established clear escalation paths for unresolved service requests, both of which will be led by the Manager. In addition, the Manager will play a key role in supporting cross-departmental collaboration, data analysis, and improvements to customer-facing technology. The Manager will also be responsible for auditing and reviewing customer-facing services across the organization through a customer experience lens, identifying opportunities to enhance consistency, responsiveness, and accessibility. Findings and recommendations will be brought forward to the CAO and Senior Management Team to support continuous improvement and alignment with corporate service expectations.

Bringing these changes forward in 2026 supports the Division's continued evolution and ensures the leadership structure is in place to respond to growing service demands while advancing strategic corporate priorities. It also reinforces the City's commitment to a customer-first culture that is proactive, data-informed, and results-oriented.

Customer Service Support for Members of Council:

The Customer Service Division provides a range of supports to assist Members of Council with navigating, submitting, and following up on service requests and inquiries. These tools are intended to improve transparency, foster accountability, and streamline communication between the City and the public.

The Customer Service Requests Dashboard, available on the City's website, offers a public-facing view of service request activity. The dashboard displays the total number of service requests by year, quarter, and month, and includes data on request volumes by City Ward, service area, and case status. Council can also view the types of service requests submitted and monitor trends over time.

Complementing the dashboard is the Customer Request Map, which displays location-specific service request data. The map can be filtered by service request type, case status, and creation date. This tool may be particularly helpful for identifying request volumes, geographic distribution, and trends within individual City Wards.

To support timely intake, resolution, and tracking, Council may wish to use the City's formal channels whenever possible. These include the Report It tool on the City's website, direct contact with Customer Service by phone or email, or in-person visits to a Municipal Service Centre. For unresolved matters or escalations, inquiries can also be directed to Inquiries@kawarthalakes.ca, the Manager of Customer Service, or the Executive Assistant for Mayor and Council.

By making use of these tools and processes, Council plays an important role in supporting effective service coordination and improving the customer experience across the municipality.

Other Alternatives Considered:

There are no other alternatives considered at this time.

Alignment to Strategic Priorities:

This report aligns with the Good Government priority of the 2024–2027 Kawartha Lakes Strategic Plan and supports the City's commitment to open and transparent service delivery. Specifically, it advances:

- Innovative and efficient service delivery through the implementation of Division Service Targets, modernization of request tracking practices, and structural enhancements to the Customer Service Division.
- Digital transformation and operational transparency by addressing current system limitations and planning for improved case tracking and performance measurement.
- Interdepartmental coordination and accountability through standardized service expectations, escalation processes, and structured performance reporting.
- Implementation of the Customer Experience Strategy as identified under the City's Master Plans and Strategies, reinforcing a coordinated, resident-focused approach to service delivery.

These initiatives also align with the City's guiding principles of openness, accountability, and service excellence. Customer experience continues to be identified as a corporate priority for 2025 through the Senior Management Team, reinforcing the importance of

continued investment in service performance, divisional coordination, and customer-focused improvements.

Financial/Operation Impacts:

This report is being received for information only. There are no direct financial or operational changes being requested through this report. Any financial considerations related to the implementation of a new CRM system, or the proposed Supervisor, Customer Experience position, will be brought forward for Council consideration through the City's 2026 budget.

Consultations:

Deputy Mayor

Chief Administrative Officer

Supervisor, Forestry and Horticulture Operations

Department Head email: jjohnson@kawarthalakes.ca

Department Head: Jenn Johnson, Director of Community Services