
HALDIMAND COUNTY

Report CEC-07-2023 Customer Service Strategy

For Consideration by Council in Committee on September 19, 2023



OBJECTIVE:

To recommend a Customer Service Strategy that outlines the County's strategic direction and roadmap for customer service activities to be undertaken corporately by staff.

RECOMMENDATIONS:

1. THAT Report CEC-07-2023 Customer Service Strategy be received;
2. AND THAT the Haldimand County Customer Service Strategy 2023-2026, included as Attachment 1 to Report CEC-07-2023, be approved.

Prepared by: Trish Cardwell, Manager, Customer Experience & Communications

Respectfully submitted: Megan Jamieson, CHRL, General Manager of Corporate & Social Services

Approved: Cathy Case, Interim Chief Administrative Officer

EXECUTIVE SUMMARY:

The Customer Experience & Communications Division has drafted a [Customer Service Strategy](#) for Haldimand County outlining proposed goals and workplan for the remainder of 2023 to 2026. The strategy outlines three key focus areas that include specific goals, outcomes and actions to be undertaken corporately. The strategy is aimed to improve corporate customer service practices affecting both external and internal customers. A tentative timeline has also been included to forecast work planned for implementation by the Customer Experience & Communications team over the next few years.

BACKGROUND:

The Customer Experience & Communications (CEC) Division was introduced in 2021 with a goal of developing strategies to foster a customer-focused culture. Since the division has been established, staff has been conducting research through stakeholder engagement, monitoring of customer service transactions, collecting municipal best practices, and developing a service inventory in order to provide longer term strategic vision and goals for customer service.

Stakeholder engagement includes feedback from both the Shape Your HC Customer Experience Survey and the Haldimand County Resident Satisfaction Survey conducted in 2022. Results from these surveys summarized customer service satisfaction levels, expectations, and concerns. Additionally, staff regularly review customer feedback provided through webforms and the customer service team.

Municipal research revealed a trend to adopt a corporate customer service strategy to assist with establishing acceptable expectations to ensure a positive customer experience. Some of the

municipalities researched include Burlington, Greater Sudbury, Guelph, Halton Hills, Hamilton, Norfolk County, and Oakville.

ANALYSIS:

Council recently approved its Term of Council Priorities for 2022-2026 which included the endorsement of a series of Administrative priorities identified by the County's Senior Management Team. Customer service has been identified as an administrative priority for 2022-2026. Developing a longer-term customer service strategy falls within the guiding principle of Corporate Image and Efficient Government, "Making change and investments that result in a visible, positive image for the County by providing a more accessible, more efficient or more cost-effective local government for residents." By adopting a corporate customer service strategy, the County is able to demonstrate its commitment to a more customer-focused approach in making improvements to service delivery that enables a better customer experience and process efficiencies.

Staff have used the data collected from stakeholder engagement activities, municipal best practice research, and customer service transactions to draft the [Haldimand County Customer Service Strategy 2023-2026](#), Attachment 1. The strategy includes a customer service vision, guiding principles, along with three key focus areas:

- create a customer-focused culture;
- enable efficient service delivery; and
- provide easy and accessible services.

Each focus area outlines long term customer service goals, actions and expected outcomes. An implementation roadmap has been included to project anticipated work planned for execution by the Customer Experience & Communications team as the lead division, in collaboration with divisions and staff across the corporation, over the next few years to meet the outlined goals.

It is important that the vision, guiding principles, and goals outlined within the Customer Service Strategy are adopted corporately and applicable to all staff, not just one division. Cross-divisional collaboration is a key component to facilitate the action items outlined in the implementation roadmap. It is also key to note that customer service recommendations pertain to provision of both internal and external customer service across the organization.

FINANCIAL/LEGAL IMPLICATIONS:

One recommendation within the strategy is to procure and implement customer service enabling technologies such as a Customer Relationship Management (CRM) system, for which the current target date is 2025. To facilitate this, there will be a future Tax-Supported Capital Budget cost proposal associated with this request. As technology is constantly changing, it is key that the technology recommendations and timelines within this strategy remain flexible and able to change as required to align with the future IT strategy.

The inclusion of any new technology related projects in future budgets will be subject to the IT Governance process. An estimated cost will be identified in the 10-Year Capital Forecast once the specific technology requirements have been properly evaluated.

STAKEHOLDER IMPACTS:

Recommendations made within the Customer Service Strategy should serve as a guideline for providing customer service. Cross-divisional staff stakeholders have a role to further engage and

collaborate with the Customer Experience & Communications team in order to fulfill some action items outlined in the strategy.

Haldimand County residents will continue to be surveyed bi-annually, to gauge satisfaction levels with service delivery, focussing on the principles outlined in the strategy.

REPORT IMPACTS:

Agreement: No

By-law: No

Budget Amendment: No

Policy: No

REFERENCES:

1. [CEC-05-2023 Resident Satisfaction Survey Results 2022](#)

ATTACHMENTS:

1. [Haldimand County Customer Service Strategy 2023 - 2026](#)