



# Customer Service Strategy 2023-2026



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# Introduction

Haldimand County is committed to making change and investments that will result in a visible, positive image for the County by providing a more accessible, more efficient or more cost-effective local government for residents, as per the Corporate Image and Efficient Government strategic pillar.

The Customer Service Strategy provides a framework for the county's customer service approach over the next few years. The plan was developed as a result of market research, data analysis, stakeholder engagement and consultation. It outlines the roadmap to enable a customer-focused approach to support positive customer service outcomes.



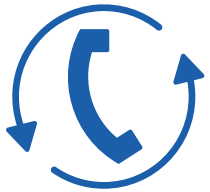
The strategy focuses on enabling a corporate customer - centric culture to optimize external and internal customer service practices using appropriate technology and tools that ultimately align with strategic direction outlined by IT.

## 2022 Research Findings:



The customer service team:

- processed 9790 payments,
- answered 37,340 calls,
  - an average of 155 calls per day.



- transferred 51% of calls to another division or employee.
- 11,000 (59%) of transferred calls are directed to secondary telephone queues.



- 5500 customers (50%) rerouted to a secondary telephone queue, were rerouted to a voice mail message instead of receiving a 'live answer' with a staff member.



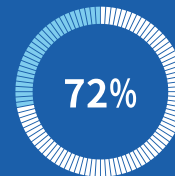
## What We Heard: Customer Service

Residents indicated that they value a friendly response, resolution to their issue, and a quick answer.

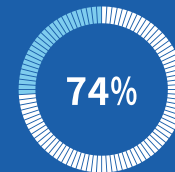


Approximately 85% of survey respondents are satisfied with customer service at Haldimand County.

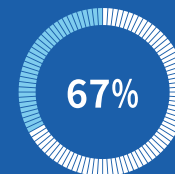
### Survey respondent summary:



Feel that Haldimand County should minimize number of phone transfers required for service.



Agree “Haldimand County should respond with clearly defined time limits”.

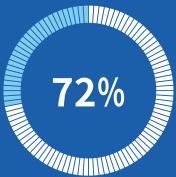


Prefer to wait on hold to speak with a staff member, “live answer” instead of leaving a voicemail.

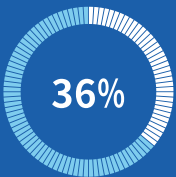


## What We Heard: Digital Services

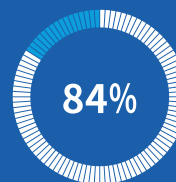
### Survey respondent summary:



Want mobile friendly, online services and the ability to check account info online.



Are interested in a digital chat service option.



Indicated staff would benefit from corporate-wide shared tool to track requests.

## Services

Staff have developed an initial service inventory listing over 200 service offerings by Haldimand County to serve as a baseline for conducting an service review in collaboration with all divisions.



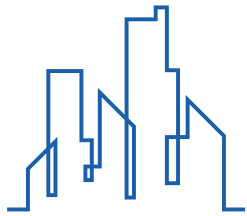
Haldimand County currently offers approximately:

- 22 online services
- 22 online forms
- 29 PDF forms

The online and PDF forms are not connected to divisional software which requires staff time to duplicate data entry.

It is key as Haldimand County expands it's online offerings to keep the customer experience first and foremost. We must ensure the digital experience is mobile friendly for our customers.

We should strive to enable efficiencies through technology enhancements allowing for integrations where possible with existing technology solutions.



## **Municipal Customer Service Trends**

Staff conducted some market research to gain a greater understanding of current municipal customer service trends. Some of the municipalities researched include: Burlington, Halton Hills, Hamilton, Oakville, Greater Sudbury, Guelph, Niagara Region, and Norfolk County. Some best practices include:

- Development of customer service strategy and framework.
- Establishment and implementation of corporate customer service standards and divisional service level agreements.
- Framework for review of services and enhancement of processes.
- Empowering staff to deliver great customer service through provision of customer service enabling technologies such as knowledge base and customer relationship management system tools.
- Digitizing the customer experience through enabling self-serve online options.
- Centralization of customer service provision enabling resolution of issues at first point of contact where possible.



## Customer Service Vision

Haldimand County strives to foster a customer-focused service culture that supports staff and provides the necessary resources and tools in order to ensure the provision of a positive customer experience that is consistent, accessible, responsive, and easy for all.

## Customer Service Guiding Principles

Our focus is our customers.



We provide a positive customer experience ensuring fair and **consistent** treatment for all.



We implement processes that are **easy** and require a customer to only have to 'tell their story' once.



We respond to our customers in a **timely** manner and provide status updates as required.



We **leverage technology** to improve and enable efficient customer service delivery.



We strive to continually improve services and **measure** our performance.



## Focus Area 1: Create a Customer-Focused Culture

**Goal:** To build and support the organization's capacity to provide a positive customer service experience.

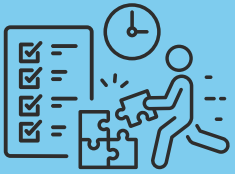
### Outcomes

- Haldimand County maintains a positive public image within the community.
- Residents and local businesses are satisfied with the delivery of Haldimand County services.
- Customer interactions result in a positive customer experience.
- Customer service standards are communicated and understood by all employees and citizens.
- Staff feel empowered and supported to provide the best possible customer service.

### Actions

- Establish a customer service strategy including a vision and action framework to increase accountability related to service delivery.
- Develop, implement, communicate and monitor corporate customer service standards across the organization to ensure consistent, positive customer service.
- Provide customer service training and resources for all staff across the organization.
- Build a 'one team' internal cross-team collaboration approach for process improvement, applying a customer 'lens' to make service enhancement recommendations.
- Solicit customer feedback through public engagement and to celebrate excellence in customer service.





## Focus Area 2: Enable Efficient Service Delivery

**Goal:** To proactively respond to our customers changing needs through leveraging opportunities that improve operational efficiencies and enhance our capacity to resolve issues at the first point of contact.

### Outcomes

- Residents and local businesses feel that Haldimand County delivers efficient and cost-effective services.
- Service areas measure their customer service delivery outputs against agreed upon service level standards.
- Customers only have to 'tell their story' once.
- Customer requests are resolved in a timely manner, at the first point of contact where possible.
- Customers receive service updates, as required, to ensure closure of customer feedback loop.
- Staff have access to resources and tools required to enable cross-divisional information sharing and efficient service delivery.

### Actions

- Continue to maintain the shared customer service knowledge base ensuring quick, easy staff access to information required to provide a consistent and accurate response.
- Develop a framework to measure and report on established key performance indicators and divisional service levels enabling improved data-driven decision making.
- Leverage new and existing technology to enable automated service processes and closure of the customer feedback loop.
- Facilitate processes that allow the customer to have requests submitted at their first point of contact.
- When first contact resolution is not possible, enable a live answer at secondary customer service touchpoints where possible.



## Focus Area 3: Provide Easy and Accessible Services

**Goal:** To provide consistent service delivery that is accessible, responsive, and easy to understand regardless of communication channel.

### Outcomes





- Residents and local business feel that it is easy to understand and access services that Haldimand County provides.
- Service information and updates are proactively and clearly communicated through available communication channels.
- Customers are able to access service through their communication channel of choice.
- Staff have access to shared tools for information enabling accurate and consistent customer service delivery.

### Actions

- Rebuild the corporate website prioritizing the user experience and accessibility in design and site navigation.
- Explore opportunities to expand self-serve online service offerings and digital communication channels.
- Review service and identify high volume customer service transactions for potential transfer to an online self-service delivery system.
- Procure and implement customer service enabling technologies such as a Customer Relationship Management (CRM) system to effectively manage and report on all customer service transactions cross-divisionally.

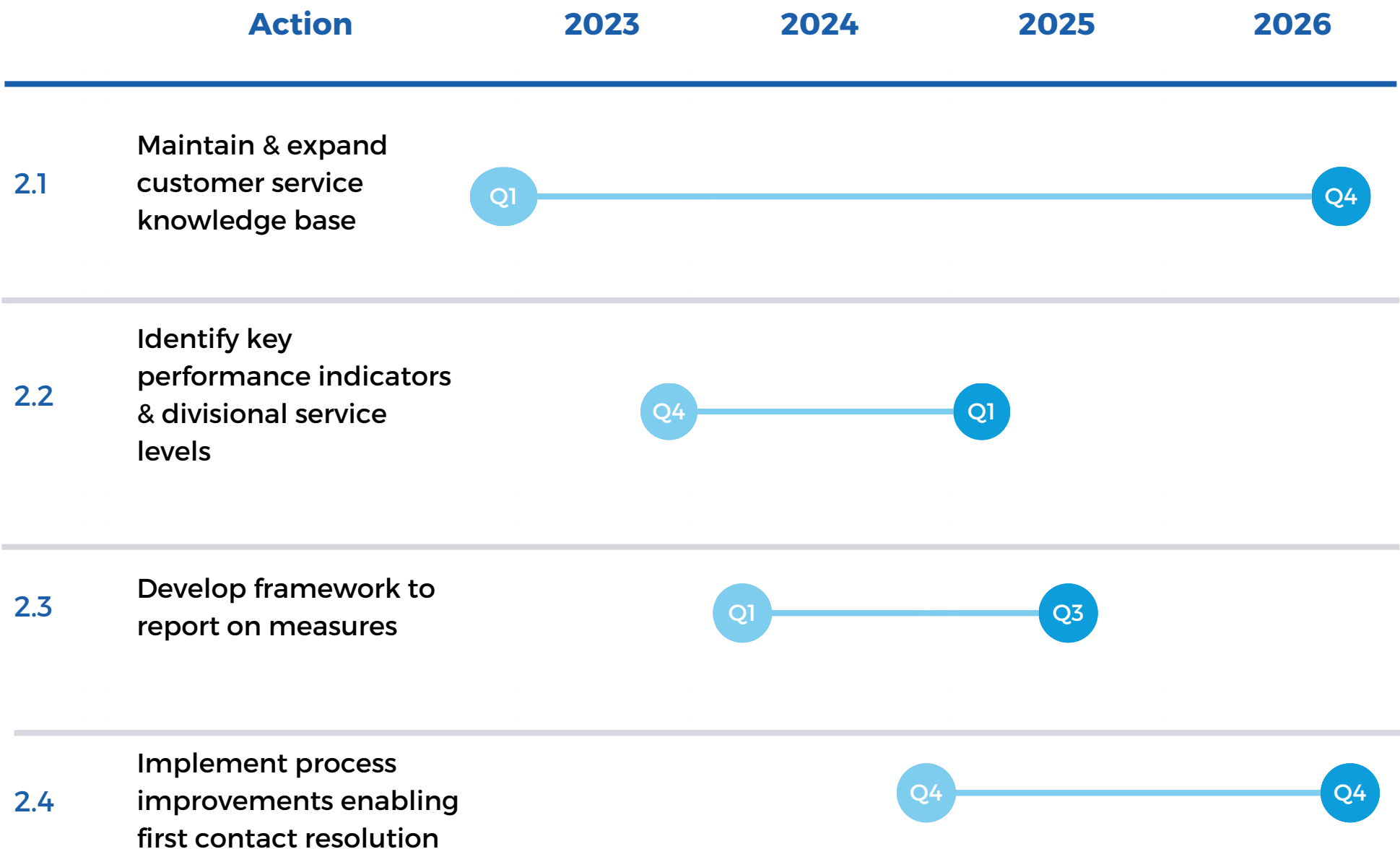
# 2023-2026 Implementation Roadmap

## Focus Area 1: Create a Customer-Focused Culture

	Action	2023	2024	2025	2026
1.1	Establish a customer service vision & action framework				
1.2	Implement corporate customer service standards				
1.3	Develop customer service training program				
1.4	Collaborative service review				

# 2023-2026 Implementation Roadmap

## Focus Area 2: Enable Efficient Service Delivery





# 2023-2026 Implementation Roadmap

## Focus Area 3: Provide Easy and Accessible Services

	Action	2023	2024	2025	2026
3.1	Rebuild the corporate website	Q2	Q4		
3.2	Identify services for digitization or change process		Q1	Q3	
3.3	CRM Market Research & Procurement		Q2	Q3	
3.4	Technology (CRM) Implementation			Q3	Q4

# Performance Metrics

## What We Expect

- ✓ Positive customer satisfaction levels.
- ✓ Positive customer feedback.
- ✓ Improved performance levels on set service standards over time.
- ✓ Increased number of digitized services.
- ✓ Improved efficiencies in service delivery.

## What We Will Do



### Engage

- Provide opportunities for customer feedback and engagement.
- Conduct bi-annual resident satisfaction survey.
- Engage with employees to solicit their feedback.



### Measure

- Establish key performance indicators (KPI's) and expected divisional service levels.
- Monitor and report on customer transaction data to support KPI's.
- Analyze and report on engagement responses.