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Town of Oakville

ServiceOakville
Contact Centre Consolidation
Oakville Transit,
Recreation & Culture

Final Report

December 31, 2019

Table of Contents

Introduction

The Town of Oakville engaged AtFocus Consulting Inc. to conduct a review of all aspects of the processes and service standards in relation to the ServiceOakville contact centre consolidation with Oakville Transit and Recreation & Culture, undertake related research, and to develop recommendations for moving forward. The work must be completed and the report posted publicly by November 30, 2019. Two areas were the focus of this review, Oakville Transit (including care-A-van and reception) and Recreation & Culture. More specifically the original scope included:
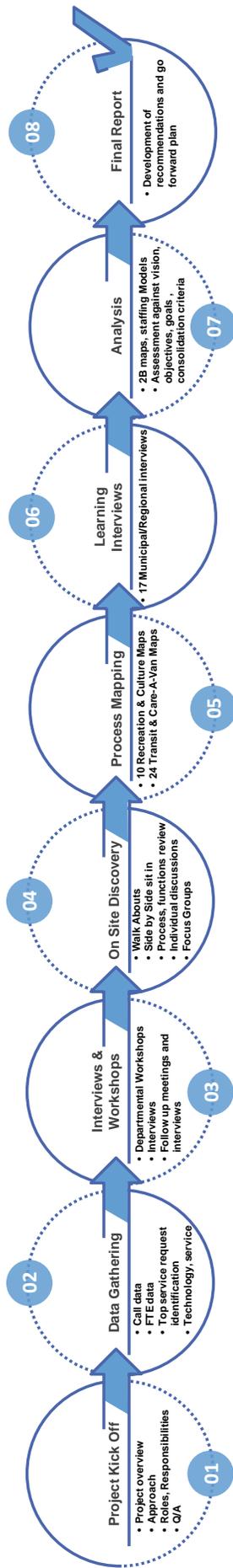
- Oakville Transit (includes various service channels e.g. counter, email, social media)
  - General inquiries
  - Trip planning
  - care-A-van bookings
  - Other customer-direct requests and inquiries as they relate to support services
- Recreation & Culture (includes various service channels e.g. counter, email, social media)
  - Program information inquiries
  - Program changes and cancellations
  - Program registration inquiries and requests
  - Requests for booking facilities and facility amendments
  - Other customer-direct requests and inquiries as they relate to support services

The objectives included developing efficiencies and service delivery improvements by incorporating/consolidating both the Oakville Transit and Recreation & Culture calls and emails into ServiceOakville (SO) , re-engineering opportunities to increase efficiency and effectiveness and identifying opportunities to change service levels.

The goals were to develop recommendations to:
- Provide a superior customer experience
- Better deployment of resources
- Improved communication with customers
- Implement an optimal staffing model
- Improve data access on which to make better data-driven decisions for continuous improvement
- Improve communication and accountability

To complete this works our approach used 8 steps as illustrated on the following page:

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commitment · quality
flexibility · discipline
rigour · integrity

01 Project Kick Off
- Project overview
- Approach
- Roles, Responsibilities
- Q/A

02 Data Gathering
- Call data
- FTE data
- Top service request identification
- Technology, service

03 Interviews & Workshops
- Departmental Workshops
- Interviews
- Follow up meetings and interviews

04 On Site Discovery
- Walk Abouts
- Side by Side sit in
- Process, functions review
- Individual discussions
- Focus Groups

05 Process Mapping
- 10 Recreation & Culture Maps
- 24 Transit & Care-A-Van Maps

06 Learning Interviews
- 17 Municipal/Regional Interviews

07 Analysis
- 2B maps, staffing Models
- Assessment against vision, objectives, goals, consolidation criteria

08 Final Report
- Development of recommendations and go forward plan

4

Background

AtFocus previously completed 2 separate projects related to SO consolidation. An initial review, conducted in 2009, which focused on determining the best Service Model for the future, one that would be effective from a Customer Centered approach while delivering effective high quality service and being efficient. From our initial review in 2009, the Town of Oakville recognized the opportunity for adopting a fully consolidated model aimed at delivering service through SO and endorsed a phased-in approach to transition to the new fully consolidated model. SO was created and implemented on that framework. A second project, completed in 2015, included a high level review of the current state of call handling within the Town, in areas previously reviewed, as well as a review of new areas. This project had 2 objectives:

- To determine if there were opportunities to further consolidate calls to SO, that were not yet consolidated
- To identify opportunities for each area reviewed on how they could improve the service provided to the public over the phone, independently, without further consolidation to SO

Transit and Recreation & Culture were included in each previous project. However, since the original project, almost 10 years have past. In the past 10 years much has changed. Including

- Introduction of enhanced systems including Customer Relationship Management (CRM), Knowledge Management (KM) solutions and advanced Interactive Voice Response (IVR)
- Self-serve applications
- Call centre maturity to one that has moved from transactional to one that handles payments, scheduling and more complex contacts from various channels

SO has adopted a number of these advancements by acquiring advanced CRM/KB, taking more end-to-end contacts for the Town across the majority of service areas and re-engineering manual, labour intensive contact processes to both streamline service and improve the customer experience. Based on this, the next level the Town and SO can achieve is to further mature into a customer experience hub. This following section or our report provides our point of view on the evolution of call centres to assist in positioning our recommendations.

The Evolution of Call Centres: Our Point of View

Call Centers have evolved over time due to 4 primary drivers:

- A focus on efficiency and/or constrained budgets
- Service & channel expansion
- Advances in technology
- The customer experience – a significant culture shift

The Original Call Centre – Take and Transfer: Call Centres started with the consolidation of inbound calls. The catalyst for this consolidation was to simplify how customers found their way through the system. The original call center dealt primarily with basic information calls (e.g. hours of operation, address/location), with other more department specific calls being transferred (referred to as a Take and Transfer' model of service). Calls were consolidated through one number, enhancing the experience for customers as they only had to call an easily remembered number and be directed to the appropriate area. This consolidation introduced a first level of efficiency, but was more focussed on eliminating multiple call transfers and customer frustration.

The Consolidated Call Centre: Next, with the introduction of improved call taking technologies (IVR, Skills Based Routing) and training, the Original Call Centre evolved to become what was termed a "Call Centre", with the ability to take and answer simple, transactional, routine calls, including the ability to take some payments. When required, calls were transferred to appropriate Subject Matter Experts, moving the Original Call Centre from a Take and Transfer model to a Split model, resulting in a more efficient and enhanced customer service.

The Consolidated 'Contact' Centre: With the introduction of further enhanced technologies such as Customer Relationship Management (CRM) and Knowledge Management (KM) solutions, the ability to support additional customer enquiries and transactional needs evolved. The Consolidated Contact Center resulted in a much more efficient and effective model for customer service. In addition, a basic multi-channel service delivery capability was achieved by directing corporate-wide email addresses and general enquiries off the web to the Contact Center. The Contact Center grew in maturity by adopting the universal agent approach, expanding hours of operation and establishing performance metrics for both the Contact Centre and Service Levels. For the first time since the Original Call Center, proactive management of service delivery and improved scheduling of calls, emails and after-call work was practiced. KM solutions supported improved knowledge, increasing the ability to take more complex calls and eliminating much of the need to transfer calls to specialists. Economies-of-scale associated with Contact Centres were achieved and the real benefits of "one and done" service delivery began to take shape.

The Multi-Channel Contact Centre – *A Digital Explosion*: Through web and mobile applications, more self-service, through online applications and mobile apps became the norm. In addition, customer interaction through multiple channels and the concept of 'anytime, anyplace' interaction was increasing, virtually eliminating simple transactional calls and emails, as these migrated to self-serve (web and mobile apps), and with that, a digital decentralized evolution was

taking place. The Multi-Channel Contact Centre was now more able to, with the support of the CRM and KB, address more complex contacts. But this did not address the need for improved walk-in and outbound contact with the customer. Walk-in was still important and needed, although a high cost option. Outbound calling to confirm and address required follow-up and clarification still remained as a back office function as Contact Centres were reluctant to absorb this function. Departments (back office) continued a silo'd model to address, what was believed to be a unique customer base and not a function that the Contact Center could address. . However, the desire to deliver a 1 window, 1 customer approach and the concept of providing a full-service customer experience remained at the fore front.

The Customer Experience (CX) Hub- *A Shift In Culture:* With the '1 Customer' evolution came a culture shift. The common customer was born (a customer of 1 Department is really a customer of the Corporation). Customer service has typically been measured from an 'Inside-Out' perspective, and has been outcome based (measured by the service delivered). The concept of Customer Experience, referred to as the customer journey, or an 'Outside-In' approach, looks through the eyes of the customer – or more specifically, it's not about the intention of service delivery, it's about the reception of service delivery. With the relatively new focus on the Customer Experience, the traditional view of the Contact Centre, even with the Digital Explosion, is broken and a new model that can manage and provide a consistent, quality and efficient service experience, from a customer point of view is created. Call taking, transaction processing, scheduling, registration, outbound calling, fulfillment and back office support is now being consolidated, and improved workforce management and performance measurement is practiced. A consistent service experience is created. Departments no longer have a need for specialized groups to address their "unique' customer", self-serve applications are designed to address the common customer and a focus on the customer experiences is mainstream.

But the Customer Experience Hub requires a firm strategy and commitment by senior management to support, reinforce and realize its benefits. Half-measures and a lack of perseverance will not allow the corporation to reap the full benefits of this fundamental, yet unique approach to service delivery.[1]

Customer Experience: It's not about your intention, it's about the customer reception.

[1] The Customer Experience Culture Shock. AtFocus, 2019

Findings

Current State Review

Both service areas (Transit and Recreation & Culture) have been developing and implementing changes to their delivery structure, have introduced some capacity for self-serve and are set to modernize their delivery structures over the next 2-4 years. Both are introducing new technologies over the next 1-3 years; however, much of the new technology will have a small impact on front-line contact delivery.

There are 7 key findings from our review of the current state relating to direct service (by the phone/through email, and some web service)

- **Inconsistent Customer Experience across the Town**
  - Different service levels, average speed of answer and longest wait times exist between SO and the 2 service areas. Although the average wait times are acceptable, there are times customers can experience very long wait times
  - The ability to manage peaks at specific times of the day combined with valleys at other times of the day, varied call lengths (some are very quick, some are very long) and seasonal call fluctuations is difficult for the 2 service areas with the staff they currently have. A low total contact volume combined with the factors mentioned above, creates a very inefficient queue and would require an overestimated number of staff to provide effective service resulting in increasing the cost-to-serve. SO has the ability to manage an efficient queue due to their higher contact volume and staffing model. In addition, call peaks can occur based on an event either predictable (change in policy/fees) or unpredictable (bad weather). The service area call handling teams are small in size which can make it difficult to provide coverage, in particular, during unpredicted peaks in calls or staff absences. This leads to an inconsistent level of service and customer experience, as the ability to increase the number of trained call handling staff and/or to provide appropriate coverage of phone handling may be limited. If this is the case, the result is longer wait times or blocked calls leading to higher abandonment rates
- **Inconsistent quality service monitoring between SO, and the 2 service areas**
  - Formal quality scorecard and quality monitoring occurs in SO but not in the 2 service areas. In addition, formalized quality call description, scripts and a KB for staff to follow only exists in SO.
- **Higher cost service model at the service areas**
  - When comparing cost per call minute, SO has the lowest cost per call minute. This cost per call minute can be driven lower by fully consolidating. As volume of work increases (calls, emails, walk-in) economies-of-scale reduce costs. The concept of doing more with less is impacted by the total volume. As indicated previously, a low volume results in an inefficient cost model.
- **High degree of paper driven processes**
  - The process maps demonstrate the high degree of inefficient steps. There is considerable printing, scanning and filing in care-A-van but there are also inefficient manual back end process steps in Recreation. SO had focused on re-engineering process resulting in little manual intervention and paper driven process steps

- **High degree of re-engineering opportunities**
  - In addition to the above re-engineering opportunities related to paper there are significant re-engineering opportunities to implement unassisted self-serve leading to minimal/no manual intervention
  - Salesforce (the current CRM/KB) is being used by SO. From our high level review it appears that the potential of this tool is not being fully leveraged. For example, a shift to a decision-tree knowledge base/service request submission format would allow for a better customer experience, would could improve the customer experience via the self-serve channel as well as lead to greater efficiencies. In addition, deploying the CRM/KB to the majority of the processes would result in less paper, and a higher degree of digital filing within a customer file
  - Recreation & Culture has indicated that there are 10 back office processes that have been identified for significant re-engineering opportunities with the implementation of Perfect Mind
  - Transit has indicated with the implementation of the new Transit App, there are significant back end efficiencies that will be realized
- **Lack of Use of Full Time/Part Time Staff**
  - Using part time staff for peak call periods would allow more flexibility to meet contact demand with less staff hours, which would result in a lower cost-per-call minute and a more efficient model of handling calls. SO uses an effective model of FT/PT and uses a formalized workforce management tool to achieve optimal scheduling. Although the use of PT is used in care-A-van, the ability to optimize the staffing model is limited with no workforce management tool. Recreation & Culture do not use PT staff
- **Lack of a robust "Contact Managed Environment"**
  - A robust call managed environment is one that effectively understands and uses telephony and other data to manage/provide service on a daily basis. Volume, arrival patterns would be known by types of contact. Full use of ACD reports and other data (e.g. quality scores) to manage and adjust service delivery should occur. Without a call managed environment, the call arrival patterns (peaks and valleys), cost-per-call minute, AHT/reason for contact and staffing requirements are not fully understood and responded to. SO is organized, has the tools to effectively work in a contact managed environment

Comparison Analysis

To determine trends across Canadian municipalities/regions, we contacted 17 organizations. We asked the following questions
- Do they handle Transit (reception and care-A-van (specialized) type of calls) and Recreation calls in their contact centres
- If yes, to what extent do they handle these
- If no, why not and are there plans to possibly further consolidate

We found that there is a varied approach to handling these types of contacts. For Recreation & Culture more has been consolidated and with the implementation of Perfect Mind (in those municipalities) the plan is to even consolidate more. For Transit reception, the majority have consolidated. For care-A-van (specialized) types of calls, the majority have not consolidated. However the reasons for not consolidating are primarily due to being out of scope of consolidation projects and/or predetermining this is a unique client base that cannot be consolidated. As with

any comparison, it is difficult to compare and evaluate as an "apples to apples" comparison (e.g. contact centres across Canada are in varied stages of maturity, have varied levels/access to tools and supporting technologies and have allowed full consolidation not to occur due to resistance of either the program area or the contact centre not wanting to take these types of calls). Decision making for the majority of the organizations we contacted are not making a fulsome decision based on the customer experience. The table that follows includes our findings. We have not included response by municipality/region as permission was not requested to publically release their responses. Permission to public release responses would have involved significant processing time that this project timeline could not allow for.

Area	Transit/Specialized	Recreation
1	Yes - General Transit and Trip Planning No - Specialized ▪ Contact Centre hours of operation of extend (day and weekend) to accommodate these calls ▪ Specialized was not part of the initial project	No ▪ Excluded from original consolidation project; as so much can be done online ▪ Once the majority of online work completed, will assess residual to further consolidate
2	No – However, handle after hours via service requests ▪ Transit contact centre, uses same CRM ▪ Did not consolidate as separate unions ▪ Experience a high volume related to trip planning which are very time consuming. As such, do not want to reduce capacity in Contact Centre, in order to focus on revenue generating calls which have same peak periods	Yes - General Inquiries related to programs Yes - Facility No - Program Registrations
3	Yes - General Transit only N/A – Specialized (other level of government had responsibility) ▪ Have reviewed but leadership resistance to full consolidation of all Transit calls	Yes – General Inquiries Yes - Program Registration No - Facility Booking (plan to consolidate next year, post re-engineering) ▪ End to end; contact centre staff have access to the wait list, previous registrations, accept payment including subsidies ▪ Do not do outbound calling out if a new program is opened up ▪ Issue a refund as an account credit. If resident would like a refund (monetary), they are required to fill out a form and submit that at a recreation centre ▪ Large recreation centre phones are redirected to contact centre at certain times (e.g. during the summer, noon to 7 am next day, during the school year and on the weekends)
4	NA - Separate entity from the city	Yes – General Inquiries (which accounts for 50% of Recreation calls) No – Program Registrations or Facility Booking ▪ Governance structure precludes the contact centre from handling calls. 23 recreation centres all operated independently (with independent decision making). each community centre is governed by a different community associations and is managed differently

Area	Transit/Specialized	Recreation
5	Yes - General Inquiries ▪ Considering further consolidation, concerned about volume and its impact on existing service levels and integration costs	Partial - Program Registration No - Facility Booking ▪ Assist with registrations as long as customer has a PIN ▪ Complexity of authentication requirements and systems integration are preventing further consolidation ▪ Online booking system under development by Recreation department to improve self serve ▪ Provide information on how to book a facility; however do not create permits or accept payment
6	No – current project underway to consolidate, no previous review completed	No – current project underway to consolidate, no previous review completed
7	No – current project underway to consolidate, high level previous review indicated to consolidate	No – current project underway to consolidate, high level previous review indicated to consolidate
8	N/A	Yes - General Inquiries No – Program Registration – No – Facility Booking ▪ Although not formalized, they will answer any inquiry where the information is on their website ▪ Recreation calls to be consolidated in latter part of 2020 except the scheduled bookings from major user groups
9	Yes - General Inquiries for transit No - Specialized ▪ Migrate/direct customers to self serve trip planner and stay on the line to teach how to self serve, transfer to transit staff if customer demands ▪ Do not handle all transit inquiries as they have one person designated at transit terminal who can radio to the bus drivers e.g. bus late. Contact centre does not does not have access to the radio function and handle all specialized calls ▪ Take service requests for bus stops to be shoveled repaired, etc ▪ Sell tickets walk in ▪ Will review ability for future consolidation once radio contact and CRM in place (replacement of current CRM now being implemented)	Yes - Facility Booking (some types) Yes - Program Registration ▪ Complete all functions for facility bookings (e.g. collect info, check availability, negotiate dates/locations, create temporary permit in class for booking). SR to Leisure services to call back to confirm booking (not yet for ice rinks, pools) ▪ Facility booking changes not handled ▪ End to end program registrations (help customers find the right program for them, create account, only transfer to leisure services for escalation (e.g. if program is filled and being put on wait list and customer escalates)) ▪ Take payment over the phone via credit card. starting in Jan/Feb will use Perfect Mind to process calls and payment ▪ Subsidy application handled in social services
10	Yes – Transit (except for selling new transit cards) No - Specialized ▪ Trip planning, selling tickets and reloading funds on transit pass (soon) ▪ Do not sell new cards as call centre does not have a counter ▪ Specialized - different union. Only log complaints. Union has stopped further consolidation	Yes - General Inquiries No – Program Registration No – Facility Booking ▪ Handle general information and assist with on line registration over the phone ▪ No plans for the future since programming is contracted out. Pool contractor handles pool rentals ▪ Cannot take payments at contact centre as such facility rentals not an option

Area	Transit/Specialized	Recreation
11	N/A	Yes - Program Registration Yes - Facility Bookings (some types) ▪ Casual users only and only for meeting rooms/halls, and ice rinks; core users are not handled in the contact centre; pool bookings are handled by the pools due to liability concerns ▪ Handle registrations for dog obedience and badminton programs; those are the only two recreation programs they have
12	N/A	Yes - Program Registration No - Facility Booking ▪ CSRs at recreation centres and at seniors centre are part of contact centre; handle same inquiries as contact centre and offer extended hours this way ▪ Do not book facilities but moving to an automated system
13	Yes - Transit No - Specialized ▪ Accept applications for care-A-van, but program is managed by external contractor for all other calls e.g. scheduling trips	No – plan to consolidate ▪ Recreation is phase 5 of their consolidation implementation. They have just completed phase 3 ▪ Only give high level answers – basic information
14	No ▪ CAO has indicated to keep in separate. Contact centre doesn't want to handle as would need to extended hours of service ▪ Technology supporting specialized transit is not good, won't allow for efficient handling of calls	Yes - General Info No – Program Registrations No - Facility Booking ▪ Hesitancy by program areas ▪ Much is still handled in person ▪ A fully functional in person service desk will be in operation in 2020
15	No ▪ Benefit of keeping it separate as it acts as a back up contact centre	N/A
16	Yes – Transit Yes – Specialized with Service Requests ▪ Specialized transit general information. Requests to book a trip or cancel a trip are sent via a service request; same day trip booking via call transfer ▪ Why not end to end: high volume, long calls? Online support tools not good, timeliness of back office to respond is slow	N/A
17	No ▪ Not investigated, no future plans to investigate	No ▪ Not investigated, no future plans to investigate

The Case for Change

Introduction

Our assessment and recommendations are based on the following:
- The Town's articulated Vision
- The Town's articulated project objectives and goals
- Our objective assessment of current contact centre practices, based on process maps, on-site visits, data analysis and our proprietary consolidation criteria assessment

During our analysis we explored 3 model options, those being:
- Digital First: Heightened focus on self-serve leaving the 'as is' current state basically intact
- Stay Traditional: Move both routine and more complex contacts to SO while structuring a balance between SO and the Departmental workload
- Customer Experience Hub: Implement a shift in what and how SO provides customer service to include public sector non-traditional areas

Digital First: Heightened focus on self-serve and move very routine inquires to SO leaving the 'as is' current state basically intact. This model would require the Departments to commit to focusing on extensive process re-engineering to modernize (end-to-end self-serve) contact processing. In addition, Departments would need to better understand the impact of the future new technology gains, e.g., impact on contact volume (by channel), contact length (by channel), impact on back office manual intervention. To adopt this model, targets should be set for the realization of the savings of both process re-engineering and technology gains. Progress should be monitored against both timelines and savings. Once improvements and technology have been implemented, residual contacts would be consolidated into SO.

We could not assess the realized benefits associated with this model as this information is not currently available for all components of the model. Both Transit/care-A-van and Recreation & Culture have significant technology upgrades planned. Transit will be implementing a more effective self-serve ride option that should result in savings and improved customer experience. The Department has indicated that the implementation should result in reduced call/email volume and after call work but a significant portion of the savings are tied to operations and how vehicles are deployed and re-engineering back office functions. This upgrade should be fully implemented by 2020; however, no estimate has been calculated for migration take up by the Department.

In regards to Perfect Mind, estimate of impact on contacts, savings, efficiencies or customer experience improvements cannot be calculated at this time by the Department. There is no certainty what the impacts of Perfect Mind will be on the process maps but it is anticipated that Perfect Mind will have more functionality related to customers and positive changes are anticipated. The implementation is targeted for 2022. The ToO has indicated that with the implementation of Perfect Mind, there are 10 back office processes that have been identified for significant re-engineering opportunities.

Our experience indicates that technology implementations can take considerably more time than planned to realize benefits fully. As such, customers may be waiting for 2+ years to experience both service and access improvements that can be realized by consolidation into SO sooner. This

model would see a delay in savings that can be achieved by consolidating with SO (due to economies-of-scale, use of their technology, contact centre management practices). In addition, the Town's Vision, Goals and Objectives would not be achieved as quickly. A high risk in moving forward with this model is that technology implementations are known to take longer than anticipated. As such the potential savings could be further delayed. While program and technology enhancements are being made, improved customer experience and savings could be realized by consolidating to SO. The investment to further consolidate is low as the high cost infrastructure components are already in place at SO. This model would see increased merit if the infrastructure was not in place at SO and the cost of set up could be differed to a digital strategy. Our review could not calculate the savings associated with this model as required information was not available from Departments.

Stay Traditional: Move both routine and somewhat complex contacts to SO while structuring a balance between SO and the Departmental contacts and workload. This model can be referred to as the Split Model. Where SO would create a Departmental service request for more complex and longer to complete contacts. This approach assumes that SO is a traditional call centre, with a focus entirely as a routine transactional centre. However, as our section on the Evolution of the Call Centre highlights, the modern contact centre has evolved into a customer experience hub which supports both the customer and the core business units through management of complex contacts, digital migration support and back office processing. The Split Model creates a 2 tier service model and customers experience degradation of service by having to be transitioned to the second tier and often wait for a response to their request. This model is becoming antiquated in the private sector through the increased adoption of enhanced technologies such as AI, Smart IVRs and Co-Browsers. Assuming that the a centralized contact center should remain traditional, means it will become obsolete in the future thus losing significant customer experience gains and savings related to expanding the model on an ongoing basis.

This model only superficially achieves your Vision, Goals and Objectives. Savings associated with this model would be significantly reduced and a 2 tier contact centre model would need to continue as in the current state.

Customer Experience Hub: This model of the future would see a shift in what and how SO provides customer service, leading to a quality customer experience. SO currently offers end-to-end service for many contacts, but a more holistic approach to servicing contacts that expands SO into a more robust *customer experience model* eliminating the need for contact transfers by including outbound and back office activities associated with the contact. SO would introduce outbound calling, back office work to complete the contact to resolution and would only involve Departments for policy/regulatory interpretation/change and specialized knowledge that requires expert judgement related to service. This model results in savings once the transition has occurred and builds additional savings as full implementation is achieved. It positions the Town proactively for customer expectation changes which will come as we have seen in the past (e.g. move to self-serve, use of social media, move away from fax/mail). This model meets you Vision, Objectives and Goals. The hurdle to this model is the requirement for all involved to adopt a "managed leap of faith" point of view. A positive and supportive working relationships with the Departments and a reengineered way of thinking about the customer (from a perspective that the customer is unique to one Department, to a customer of the Town, no longer unique .. a customer is a customer) is necessary to ensure the transition is successful. SO has already moved in this direction. SO has the

foundational attitude, structure, processes and tools to meet the challenge to grow and expand, but will not be successful without the entire Town's support.

Our recommendation is to move to this model. The remainder of this report is based on this recommendation.

Analysis and Assessment

Articulated Goals and Objectives

The Town has articulated project objectives and goals. Our analysis against these project objectives and goals strongly suggests that further consolidation is required in order to achieve these. The table that follows identifies each objective and how the customer experience hub positively impacts the Town's service delivery.

Objective/Goal	Impact of the Customer Experience Hub
Objective: Developing efficiencies and service delivery improvements by incorporating/consolidating both the Oakville Transit and Recreation & Culture contact centres into ServiceOakville.	Significant efficiencies and service delivery improvements can be achieved by consolidating both the Oakville Transit and Recreation & Culture contact centres into ServiceOakville (SO). Economies of scale, utilizing existing technologies (CRM, Skills Based Routing, Quality Monitoring, Workforce Management and IVR) and processes.
Objective: Re-engineering opportunities to increase efficiency and effectiveness.	Re-engineering opportunities that were identified but have not been implemented since our last review can be accomplished during the transition to SO. In addition, the CRM technology and associated knowledge base (KB) in SO can contribute to increased efficiency and effectiveness. Salesforce (the current CRM/KB) is currently being used by SO appears to have untapped potential to further re-engineer the way service is provided. For example, a shift to a decision-tree knowledge base/service request submission format would allow for a better customer experience, would prepare the ToO for an improved customer experience via the self-serve channel as well as lead to greater efficiencies. In addition, deploying the CRM/KB to the majority of the processes would result in less paper, and a higher degree of digital filing within a customer file
Objective: Identifying opportunities to change service levels.	Established service levels are higher (better) in SO. Recreation & Culture, as well as Transit have established service levels that are lower than SO. Transit is not achieving this lower service level and although Recreation & Culture are achieving their service level, it is lower than that of SO.

Objective/Goal	Impact of the Customer Experience Hub
Goal: Provide a superior customer experience.	The customer experience requires on "outside-in" perspective, asking, how would a customer want to access service? Would they want one window? Would they want reduced wait times? Would they want additional service/questions to be answered while on the line or in person. Further consolidation creates the environment of a holistic customer experience.
Goal: Better deployment of resources.	Further consolidation allows for increased economies-of-scale. Not only for these two Departments, but additional resources in SO allows for increased capacity for the entire Town.
Goal: Improved communication with customers.	Consolidating the majority of services allows for better collection of data and management of that data. An understanding of why/when/how people are contacting the Town allows for proactive communication to be established. Using data to manage customer expectations assists in managing channel development and taking proactive measures to manage escalations. In addition, customers can have a single point of contact (One Window) to determine any/all outstanding service requests and questions. A holistic view of the customer is accomplished by logging all contacts and building a profile of that customer. The CRM utilized by SO accomplishes this.
Goal: Implement an optimal staffing model.	The concept of a consolidated contact centers works. It has long been established that economies-of-scale (doing more with less staff) are a benefit of consolidation. The existing tools deployed by SO are robust enough to establish a Customer Experience Center…moving away from a traditional and historic definition of a simple transactional call center. Today, contact centers are transitioning to service specialized contacts as transactional, routine, easy to process contacts are being automated with self serve options.
Goal: Improve data access on which to make better data-driven decisions for continuous improvement.	One window equals one data base. Currently data in each of the Departments is not available. Contact types are not traced, volumes, handle time, processing time and first call resolution are not being captured and there is a lack of a system to enable this. Management decisions on how to staff, how to schedule for optimum efficiency and effectiveness for service delivery cannot be accomplished without this data. SO has the enabling technology to accumulate this type of data and to manage proactively with it.
Goal: Improve communication and accountability.	The new CRM has the ability to establish service levels both in contact management and in fulfillment. Currently accountability is not based on objective data. Utilizing the CRM, customers can access their contacts through a service request tracking system to determine status, leading to reduced contacts and increased trust.

Additional Consolidation Assessment Criteria

The following 6 criteria were used to assess the ability of the organization to achieve critical components for effective and efficient service delivery. Those being:

- Ability to achieve your Vision
- Ability to improve consistent quality and access to service
- Enable process improvement
- Increase ease of implementing migration to self- service
- Results in doing more with less
- Increases Bird's-Eye-View

Ability to Achieve your Vision of 1 Town, 1 Window, 1 Customer.

From a customer perspective a single entry point (walk-in, phone, email, self-serve) significantly enhances customer service and the customer experience. Ease of entry, access and the "one and done" service experience has been what numerous customer service surveys have reported on. One window translates to:

- All customers are treated equally and receive the same service standards
- Consistent quality and professionalism
- Ensures getting to the right person quickly and having your questions answered quickly
- Ensures economies of scale, while increasing the number of service representatives available at all times of the day
- A holistic point of view of the customer

In addition, increasing the capacity and scope of SO, increases capacity for servicing all Departments. SO customer service representatives work collectively to achieve quality of service for the entire Town.

A shift in thinking must be achieved. When allocating staff to SO, Departments are not losing staff they are gaining multiples of staff working the front view into the Town. SO can assist Departments to effectively deal with customer contact peaks and valleys, disruption in services and planned spikes in requests for service (e.g. recreation registration periods). The most powerful way to think about this type of change is that the area gains all of SO staff to help their customers rather than losing the staff they currently have. The larger complement of SO staff results in better service levels for all contacts, not just the final phase of transitioning areas by providing the ability to manage just in time when needed, by deploying real time data on why customers are calling and proactively altering the service model to accommodate unplanned service disruptions.

Ability to Improve Consistent Quality and Access to Service

Currently both Transit and Recreation & Culture do not conduct formal quality monitoring, do not have a robust knowledge base, and do not formalize their workforce management process by utilizing scheduling software. These 3 tools are utilized by SO and together increase quality, consistency, accuracy and improves access to staff.

Quality monitoring ensures that the correct process, information, knowledge and customer management technique is used by everyone. Managing the contact to the right length while ensuring the customer is heard and serviced will decrease the average handle time (AHT) of the call. Having a robust knowledge management system (e.g. decision tree logic, intuitive, encompasses scripting, ability to simultaneously update content) ensures accurate, consistent information and reduces the time to service the customer. Accurate scheduling of staff to meet peaks, valleys, planed absences and the ability to adjust real time to meet demand, increases the access to staff by the customer by reducing wait times and also eliminating blocked calls. Appropriate scheduling

using contact data (for calls, walk-in and emails) significantly increases the efficiency of the centre and ensures staff are scheduled when required and have minimal off customer service work time (formally referred to *non productive* time).

Fully consolidating offers increased access to all services at the same location, through the same phone number and a consistent service area for digital interactions ("e"). In addition, for in person, Townhall is easily accessible all day (by car or transit).

Enable process improvement

In the current model of delivery within Transit and Recreation & Culture, processes have not been significantly re-engineered since our last review. Transitioning to SO provides an opportunity to process improve utilizing SO technology (CRM, CTI, IVR, Quality Monitoring) and adopting lean processes related to SO. By re-engineering prior to going live in SO, there is an opportunity to smooth the transition for customers from the current to the future.

Increase Ease of Implementing Migration to Self- Service

As knowledge and process decisions are documented in the Knowledge Base (KB), the ease of establishing self-serve is increased. In addition, a migration plan supported by SO staff can effectively increase the uptake of self-serve. The migration plan begins with a commitment of staff to inform customers of an easier way to accomplish functions. It also involves making available self-serve options at the front counter and introducing new technologies to assist with migration. The ROI for introduction of new technologies is easier for a larger queue size that can also measure and monitor migration success.

Results in Doing More With Less

Expanding SO enhances the economies-of-scale. Staffing models prepared by AtFocus calculate a lower staff complement for a larger queue size post consolidation. In addition, larger SO staff complement could present an opportunity to offer expanded service hours and a reduction in costs associated with after-hours service.

Increases Bird's-Eye-View

Analyzing data from each of the Departments was difficult. Neither area logs contacts by service request type. The practice of providing direct phone numbers and not logging into the queue for outbound calls may significantly affect data. Basic data such as blockage rates, average handle times, service level achievements, highest wait periods (when and for how long) and reasons for customer contacts by volume are not know by the areas. Consolidating offers the opportunity to have all contacts logged by contact type and to determine a bird's-eye-view for contacts across the Town (show the entire contact picture and show individual service area activity). Understanding why customers are contacting, how long it takes to service the specific contact, seasonal/monthly/daily/weekly distribution allows for effective customer service management. In addition, there appears to be some inconsistency in application of corporate policy (payment, lost/found and complaint escalation). In a consolidated environment, these procedures can easily be standardized and customer feedback effectively managed and used to make proactive changes.

Recommendation to Expand ServiceOakville by Service Request

The top calls were identified in each of the areas and process mapped to identify the work flow in handling the contact. A total of 6 process maps were completed in Transit Reception, 18 in care-A-van and 10 in Recreation & Culture. Each of the process maps represents the current state workflow for handling the contact, the associated volume and average handle time by contact could not be documented as formalized tracking per contact is not completed. The maps show specifically where in the process technology is used, what applications or paper files are used and where expert knowledge and specialized skills are required. The Departments have signed off on the maps.

The process mapping exercise confirmed that many of the top calls received were of a transactional nature and do not require in depth specialized subject matter expertise or expert judgment. This indicates that the required knowledge related to handling these contacts can be documented and learned. With access to the proper/required systems and with training, the majority of the calls could be handled by ServiceOakville. This exercise also demonstrated that significant re-engineering opportunities should be explored for Recreation & Culture and Transit Reception and care-A-van. If the Town considers a different model in moving forward, these re-engineering opportunities should be followed up on regardless of a final decision to "move the service request".

Estimated Savings

Estimated savings have been calculated based on the recommendations of moving service requests to SO and re-engineering as described in the above tables. To calculate these savings industry accepted staffing models have been prepared. The following is a summary of data used (as provided by the Town).

Metric (2018 data used)	care-A-van (outbound not available)	Transit (outbound not available)	R&C Including Outbound*	Service Oakville	Fully Consolidated Including Outbound
Calls Offered	62,476	11,457	31,618*	99,295	204,846
Calls Answered	55,120	8,734	30,262	93,319	NA
Daily Volume of Calls (based on 251 working days)	249	46	126	396	816
AHT Seconds (current)	138	158	68	134 (includes logging all calls into the CRM)	127
Average Speed of Answer	219	103	33	31	NA
Abandon Rate	11.8	23.8%	5%	5%	NA
Actual Service Level (sec)	52%/120	69%/120	93%/120	78%/30	80%/30
Email Volumes	5,200	1,459	16,190	18,339	39,878
Email AHT estimate provided by ToO	360	360	360	360	360
Volume of emails once converted to current call AHT	14,740	4,136	45,893	51,985	113,040
Adjusted Daily Calls (about 1 email is calculated as 2.8 calls)	310	63	311	608	1,277

* Includes 5,199 Outbound Calls from Rec. & Culture
** Measured at 80/30 for SO all other areas at 80/120
*** Does not include Operations Staff - Off Normal Coverage or back up staff
**** Does not include after hours - Answer Plus

Assumptions/Working Notes For Future State:
- 251 working days
- 2018 data utilized
- AHT calculated on ACD reports
- Calls Offered (not calls answered) utilized to calculate full load
- Traditional standards are 30% or less off call work. We increased this to 50% to allow for off-call work in the current state to incorporate post-call process steps
- Recreation & Culture calculated with inbound and outbound. Outbound numbers not available for Transit (reception and/or Care-A-van)
- ServiceOakville calculated at 80% of calls in 30 seconds service level

- Transit and Recreation & Culture calculated at an increased service level of 80% of calls in 120 seconds service level
- Fully consolidated calculated at 80/30 service level
- Blockage rates not provided
- A gap in total numbers may exist for Recreation & Culture. The practice of providing direct numbers and logging/not logging into the queue for outbound calls will possibly decrease the actual total number of calls and may also affect AHT

Estimated Savings

Using the results of our staffing model calculations, estimated savings during implementation/6 months post transition are estimated at $75,000 annually. Estimated savings, once the transition is stabilized and processes are re-engineered, are $400,000 annually. Additional savings can be achieved depending on the level of additional investments made in ServiceOakville (e.g. enhanced knowledge base, electronic signatures, etc.) and the progress in moving to a fully managed contact center environment, allowing for an optimal staffing model to be achieved through FT/PT splits, effective scheduling, continuation of other activities for managing the contacts and re-engineering to reduce printing, paper files, emails and outbound calls.

In addition, staffing requirements for SO have only included customer service representatives (CSRs). We have assumed that the following functions exist in SO currently and will remain post transition:
- Quality Monitoring
- Analytics
- Work force management (scheduling)
- Maintaining the knowledge base
- Back up to supervisor (e.g. a senior CSR/team lead type of function)

Service Oakville Recommendations

Although a detailed review of SO was not in scope, the following is a list of recommendations that may assist with maximizing people and processes in SO.
- Use Intelligent Call Routing software for distribution of calls and emails
  - Consider moving email to a cloud contact centre platform and use skills-based routing to maximize distribution
  - Launch chat and include this in the routing
- Increase call deflection, through enhanced IVR and expanded self-serve
- Enhance Work Force Management to ensure an optimal staff model
  - Include email, walk in, outbound associated with the contact and other new after call work (e.g. mailings, if these continue)
  - Consider an agent portal to improve scheduling efficiency, resulting in higher agent occupancy
- Move training focus from classroom to eLearning. eLearning should reduce overall training hours, physical space requirements and results in enhanced scheduling flexibility
- Implement a remote agent program, reducing the real estate footprint, increasing morale and increasing the ability of just-in-time peak load management
- Develop effective migration strategy components including the introduction of Co-Browsers which includes the ability to "share" control of a device's screen or window in real-time between two remote users

Implementation Recommendations

1. Establish timelines with a start and projected completion date
2. Establish a project team: Project manager, 1-2 re-engineering specialist, project team involving service areas and SO and change management support
3. Develop required Plans:
   - Resource plan
   - Change Management Plan
   - Communication Plan
   - Training Plan
4. Assess CRM expansion ability and requirements
5. Reengineer with a focus to eliminate heavy reliance on paper/files including adopting the use of an electronic signature
6. Conduct service risk management assessments with a view to reducing non-value add activities/functions – e.g. if the majority of appeals for care-A-van applications are upheld, review process as it is not effective and/or assume eligibility and spot check
7. Complete disentanglement in Departments
8. Build knowledge base in SO
9. Phased in using pods with skills-based-routing moving to universal agent as knowledge is built and trusted
10. Track contacts and understand service demands – log calls, emails, walk-in
11. Move to universal agent once transition is stabilized
12. Develop enhanced self-serve end-to-end (unassisted) that reduces manual intervention. Fast forward unassisted self-serve where possible
13. Develop channel migration plan
14. Explore expanding CRM to Transit and Recreation & Culture – determine cost benefit and improved customer experience
15. Investigate if Perfect Mind will/can be integrated to CRM
16. Assess Route Match for expanded "e" capability. Assess variability of front end CRM
17. Determine benefit impacts of Perfect Mind and Transit App for SO