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## 2018 CAPITAL BUDGET BRIEFING NOTE

### Update on Modernization Initiatives: Customer Service Strategy and New Service Delivery Model

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#### Issue/Background:

The City of Toronto is committed to delivering improved service to the public through innovation, modern technology and improved efficiency. The Customer Service Strategy was developed to guide customer service modernization across the corporation through a *digital first* approach. As such, initiatives outlined within the customer service strategy are part of business transformation and service modernization efforts, and aim to provide responsive, accessible, high quality service delivery to the public, while also reducing the cost to serve. These initiatives will streamline processes, improve productivity, and encourage efficiencies, which in turn will maximize value for residents and businesses.

The customer service strategy identifies a number of initiatives that are planned over the next five years, relying on two foundational components: a refreshed City website and a new corporate customer relationship management platform. This note will provide an update on the status of those two items, as well as information about other customer service transformation work currently underway.

#### Key Points:

#### THE NEW SERVICE DELIVERY MODEL

The corporate customer service strategy, launched in 2016, is the organization's roadmap to a new service delivery model. To summarize, the goals of the strategy are to:

- Adopt a customer-centric service delivery model through a "digital first" approach;
- Embed a culture of customer service excellence across the organization;
- Foster continuous improvement and accountability on customer service.

The new service delivery model will ensure:

- Integrated service delivery across multiple channels;
- Improved access to service with the ability to complete service requests through a channel of choice with increased online offerings;
- Customer centric service design, bundling services in a manner that makes sense for customers;
- Embedded service excellence with a focus on continuous improvement.

## Foundations of the New Service Delivery Model

The overall service strategy document provides the basis for a number of organizational projects that are rooted in both culture change and business transformation. The following section provides an update on the status of two foundational technology initiatives:

- *Refreshed City of Toronto Website:*

Enhancements to the City's website have been completed. The new toronto.ca website was soft launched on December 11, 2017 and offered staged improvements throughout 2017. The new website improves access to information through intuitive, simple navigation, along with concise, actionable, and accessible content written for public viewing. The mobile first design of the site will support the ongoing migration of services to the online channel. As the organization begins to employ more citizen centric principles in its service design, the refreshed site will support increased online public interaction.

- *Customer Relationship Management (CRM) Platform:*

CRM technology is a critical foundational element of the City's broader Digital First Customer Strategy. The technology is both flexible and scalable, and provides the City with strong data analytics and universal channel capabilities. The CRM will provide the following benefits:

- ***Customer Service:*** The CRM will enable a better understanding of customer trends, experiences, concerns and preferences, helping to foster better relationships with our customers. The City will be able to provide proactive information and services to its customers. The CRM will also enable the City to deliver a consistent customer experience across channels.
- ***Operational Effectiveness:*** The CRM will support faster, more accurate decision making and more effective resource allocation at the City, while lowering the cost to deliver service.
- ***Key Component in other modernization efforts:*** The CRM will serve as an integral tool in other modernization initiatives across the City. For example, the Human Services Integration Project (HSI) plans to utilize the CRM to exchange information across three divisions, reducing the burden on clients to have to re-tell their story. The CRM will enable HSI to integrate its front-end processes, standardizing the service experience across all channels, while reducing duplication and improving operational efficiency for the City.

The City undertook a competitive process to acquire a CRM platform. 311 Toronto, in partnership with the Information and Technology Division and Purchasing and Materials Management Division, led the acquisition effort. The request for proposal was completed in the fall of 2017 and a vendor has been selected; contract negotiations are currently being finalized with an anticipated completion in the first quarter of 2018.

311 Toronto is planning the first phase implementation of the CRM technology with two City divisions: Toronto Water (TW) and Municipal Licensing & Standards (MLS). The planning work with TW and MLS has started and will continue into the first quarter of 2018 with plans

to implement in Q2 2018. In addition, 311 Toronto is working with a number of City divisions to plan further enterprise rollout of the CRM tool. That work includes readiness assessments, process reviews and technology integration planning.

### **Customer Service Governance**

The City is developing a model to modernize its governance structure in order to set a foundation for internal service modernization at the City. Governance modernization will work to streamline the governance process by centralizing oversight for key areas of change, which includes a lead committee dedicated to customer service. Under the new model, the Customer Service Steering Committee will undergo changes to its current structure, including:

- A target of 8-10 members, with a periodic rotation, pushing members to think more corporately about strategic decisions;
- Meetings that are less frequent and longer;
- Meetings focused on strategic governance - Information updates will be shared in materials prior to meetings and authority will be delegated to tactical teams that are empowered to execute various customer service initiatives.

These changes will refocus Committee meetings on strategic governance and allow the Committee to better integrate customer service initiatives on an integrated, city-wide basis.

### **Service Delivery Model Transformation**

The new service delivery model will serve as the underlying support structure for new methods of service delivery. The City's modernization initiatives aim to provide customers with enhanced service options and improved accessibility, while also increasing operational efficiency. The work currently underway will improve access to services for people with disabilities and vulnerable populations by removing some requirements to visit facilities or speak to City staff by phone, although assisted service options will continue to be offered. The following initiatives help support this transformation:

- *Service Migration to Digital Channels:*

The digital migration initiative has begun moving services from primarily traditional channels (telephone and counter) to digital channels (online, mobile, etc.), with the first set of online services to be completed by the first quarter of 2018. The City aims to migrate services from its service counters located within City of Toronto civic centres to digital channels by 2022.<sup>1</sup>

- *Optimization of Divisional Service Counters at Civic Centres:*

As service transactions are moved online, division-specific counters at civic centres will gradually be closed, and transactions delivered at these counters will be migrated to five

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<sup>1</sup> Based on Channel Assessment tool criteria which determines the cost-benefit of moving services to online channels.

integrated "Toronto at Your Service" branded counters<sup>2</sup>. Each location will house technology to allow the customer to complete the transaction themselves via a self-serve terminal, or be directed to the appropriate onsite staff person. This project will ensure a consistent customer experience regardless of the division, location or service channel, and is flexible to meet changing customer expectations. It will also decrease operational costs, real estate requirements, and the need for separate resources, technology and support to provide services.

- *Expansion of self-service channels & Assisted Service*

Integrated service counters will include self-serve terminals for customers who may not have access to a personal computer or who wish to complete online transactions at a City facility. This allows customers to access general information and complete transactions without interacting with a live-person. Assisted service will continue to be provided for customers who cannot use online government services on their own, either as a result of limited access or understanding.

- *311 as a Service Desk Model:*

Supported by the new CRM platform, the existing 311 business model will evolve into a service desk design (or Toronto at Your Service model), in which Tier 1 transactions, such as general inquiries and requests for services, will be offered through online or mobile applications, allowing 311 to focus on more complex transactions. This model offers a single point of contact within the organization for managing customer incidents and service requests. Customers will benefit from improved call answer time and decreased call duration. During the transition to the new model, 311 will focus on the evolution of processes and technology, which will result in greater access to information, services, a greater choice of service channels, and reduced costs for service delivery.

## **Key Customer Service Accomplishments**

- The Web Revitalization Project team published all service topics to the new City website and soft-launched the City's new public website in December 2017.
- MLS implemented online services for clients: business licence renewal, registration for pet licences and payments, and a tool where clients can view real time wait times at MLS counters.
- Toronto Water installed 476,000 digital water meters to enable the MyTorontoWater application for real time water consumption information.
- Toronto Building improved the application review process for clients through the implementation of the FASTRACK program (residential), and Commercial Xpress.
- The HSI team integrated three divisional call centres for access to income supports to a single human services phone number. HSI also launched an online finder tool to enable clients to easily receive a personalized list of human services online.

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<sup>2</sup> "Toronto at Your Service" Counters will be located at civic centres (downtown; North York; Scarborough; Etobicoke and East York).

- In August of 2017, 311 Toronto upgraded its knowledge base (KB). The KB provides 311 staff with the most accurate, up-to-date information on City services and customers themselves can access the KB via the City's 311 webpage.
- 311 continues improvements to its online service request tracking system. This feature allows customers to check the status of their service request for insight into the progress of their request.
- The RFP for the new CRM tool completed in 2017; a sales agreement to follow in early 2018.

## **NEXT STEPS**

- Customer service updates will continue to be included in the Long-term Financial Direction staff reports in 2018
- Implement phase 1 of the CRM platform with TW and MLS (implementation by Q2 2018)
- Officially launch the City's new public website (Q1 2018)
- Work with City divisions to implement the customer experience transformation, starting with the online migration of services for Transportation Services and Revenue Services ( Q1 2018)
- Proceed with planning of the 2018 Optimization of Divisional Service Counters at Civic Centres

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