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## 2023 OPERATING BUDGET BRIEFING NOTE

### Customer Experience Division (311)

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#### Issue/Background:

- On January 13, 2023, Budget Committee requested the Director, 311 Toronto provide a briefing note on the following:
  1. (1a) Accountability process for closing the loop from a 311 call (case closing), (1b) with definition of a complete call included.
  2. Metrics for tracking the quantity of non-emergency calls redirected from 911 to 311.
- The new enterprise customer relationship management tool (CRM) has improved efficiency, productivity, and agent experience with a reduction in the number of clicks to complete customer intake while increasing customer use of low-cost self-serve channels.
- The CRM has also empowered customers to connect with the City how and where they want, with the introduction of new channels (live chat & a mobile application), the ability to access service in a variety of languages and the ability to receive status updates via SMS or email notification.

#### Key Points:

##### **(1a) Accountability process for closing the loop from a 311 call (service request)**

The current high-level life cycle and accountabilities of a 311 service request (SR):

1. A customer calls 311 or uses a self-serve option to create a SR.
2. When the SR is created in the CRM, it is directed to the appropriate division in the back end. The division may open one or more work orders in their divisional work management system to assign the work needed to fulfil the SR.
3. Once the work order is created, the division inputs information into the work management system as they make progress towards the work order, which in turn sends updates to the CRM.
4. With the CRM, customers can opt-in to receive status updates on their SR via email or SMS. If the customer opted-in for status updates, the customer would automatically receive updates on the status of their SR as information is updated in

the CRM. If a customer has not opted-in to the status update feature, they can check the status of their SR online or by calling 311.

5. It is the accountability of the investigating division to ensure the information within their divisional work management system is up to date. When all associated work is complete and the work order is closed by the division, that status gets reflected in the CRM and is sent to customers who opted-in for updates. Please see (1b) for a definition of a complete SR.

### **Opportunities for Improvement:**

- Analysis conducted by 311 shows there is an opportunity to **improve the quality of status updates and case notes left within divisional work management systems and the CRM**. Sometimes, notes can be incomplete or missing, and they are often not written in a customer-friendly manner, leading customers to call 311 for clarification or additional information regarding their SR. These calls can be time-consuming for 311, as it is the accountability of 311 to locate the information that is needed to close the loop with the customer.
- **There is further opportunity to improve interdivisional transfers of SRs.** Currently, the process to transfer a service request from one division to another is manual. When transferring a ticket, the originating division will sometimes close the ticket within their work management system, which triggers an automatic notification to the customer to indicate that their SR has been completed. This causes confusion and frustration for our customers, as their tickets have been closed without their request being resolved, and it can lead to additional follow-up calls being made to 311.
- 311 Toronto will continue to work closely with its partner divisions to improve the process from end-to-end and to ensure that information shared with customers is secure, private and informative.
- Technology Services, 311 and partner divisions share accountability for the change management and coordination of processes and back-end systems, as well as the quality of notes and updates that are sent to customers.

### **Next Steps**

- A working group has been established between the Customer Experience Division and Technology Services to develop an action plan to address the listed opportunities for improvement in a phased and achievable approach. The working group will work with partner divisions to enhance divisional back-end systems, processes, and hand-offs with 311 to improve the overall quality of status updates, improve the process for interdivisional transfer of SRs and to ensure the end-to-end

SR process is seamless for our customers. Staff will return to provide an update to Council members on the action plan, with associated proposed phases and timelines.

- In addition, 311 and Technology Services will work with Transportation Services to recommend a pilot for the improvements identified. The pilot will focus on enhancements to Transportation Services' new work management system to ensure that status updates and notes that are passed through to 311 are meaningful for customers and 311 staff.

**(1b) Definition of a complete call (service request)**

- A "complete call" refers to a situation where all associated actions have been completed in relation to a general inquiry or service request.
- For general inquiries, this is when the customer has received all requested information.
- A service request is considered complete/closed when:
  - It has been investigated by a division and the customer's issue has been resolved (e.g., pothole has been repaired, new collection bin delivered etc.).
  - A work order has been created by the investigating division and all activities associated with that work order have been completed.
  - It has been decided no further action is required by the division after investigation.

**(2) Metrics for tracking the quantity of non-emergency calls redirected from 911 to 311**

- All metrics included below are based on 311 data and analytics.
- There are challenges to determining the exact number of redirections from 911 to 311, as calls may be directed from multiple unknown numbers or customers may hang up and contact 311 directly rather than by transfer.
- Based on historical estimated data, 311 estimates the annual volume of transfers from the Toronto Police Service (TPS) Non-Emergency Line (416-808-2222) is approximately 10,000 calls per year. These calls typically relate to property concerns, noise complaints (unrelated to noisy parties), illegal dumping, traffic signal maintenance and other services where the City is responsible.
- 311 has more accurate data on the annual number of calls transferred from 311 Toronto to the TPS Non-Emergency Line. In 2022, 311 redirected 13,969 calls to the

TPS Non-Emergency Line. See below for the annual number of calls transferred from 311 to the TPS Non-Emergency Line from 2018 to 2022:

<b>Annual Calls Transferred from 311 Toronto to the TPS Non-Emergency Line</b>					
<b>Year</b>	2018	2019	2020	2021	2022
<b>Total Calls</b>	15,212	16,024	11,204	13,873	13,969

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