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## Council-In-Committee Meeting – June 11, 2024

Subject: Norfolk County Customer Experience Strategy and Action Plan  
Report Number: CS-24-083  
Division: Corporate Services  
Department: Accessibility and Special Projects  
Ward: All Wards  
Purpose: For Decision

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### Recommendation(s):

That Council receives Report CS-24-083 – Norfolk County Customer Experience Strategy and Action Plan; and

That Council hereby directs staff to proceed with the creation of a business case for a permanent full-time Customer Experience Coordinator position responsible for leading the implementation of the Customer Experience Strategy and Action Plan, to be considered as a New Budget Initiative during the 2025 levy supported operating budget.

### Executive Summary:

The following report provides an overview of the attached Norfolk County Customer Experience Strategy and Action Plan undertaken by The Experience Advisors between November 2023 and May 2024. The strategy provides 19 recommendations and an action plan, serving as a guiding framework for all operating areas within the County to enhance the overall experience for both internal customers (employees) and external customers (residents, businesses, and visitors).

### Discussion:

#### Background:

Following a competitive bidding process, Norfolk County retained the Experience Advisors in November of 2023 to review current customer experience practices and develop a customer experience strategy and action plan.

## **Project Objectives:**

The main objectives as outlined in the Request for Proposal were to:

- Develop and deliver a Customer Experience Strategy and Action Plan that shows employees how they will contribute to Norfolk County's customer service culture.
- Identify opportunities for increased effectiveness and efficiency in service delivery by conducting a comprehensive review of how services are delivered by the County.
- Define how the County will provide access to consistent, reliable, efficient, and effective information where, when, and how customers want it.
- Emphasize the critical connection between both internal customers (employees) and external customers (residents, business and visitors).

## **Project Approach and Major Outputs:**

Below outlines the various phases undertaken during the project, activities performed, and major outputs and deliverables met across the project timeline. Please note some of the work was completed concurrently:

### *Phase 1: Current State Assessment (November 2023 – February 2024)*

- Gathering and initial review of existing customer service documents and policies
- Review of current service channels and knowledge management
- Jurisdictional scans and industry best practice benchmarking
- Extensive onsite research at various in-person service locations

### *Phase 2: External and Internal Engagement (January 2024 – March 2024)*

- Conducted 25 employee 1:1 interviews with various members of Norfolk County's Operational Leadership Team (OLT)
- Conducted 5 front-line employee group workshops with various operational areas including ServiceNorfolk, Roads, Recreation as well as Health and Social Services
- Deployed 1 internal employee survey
- Deployed 1 external customer survey
- Conducted 1 Staff Technical Team (representatives from various operating areas across the Corporation with customer-centric roles and responsibilities) visioning workshop
- Conducted 1 Council visioning workshop

### *Phase 3: Customer Experience Strategy and Action Plan (March 2024 – May 2024)*

- Comprehensive data analysis
- Utilized the insights for the analysis report and initial versions of the Customer Experience Strategy and Action Plan
- Incorporate stakeholder feedback and revisions into the final versions of the Customer Experience Strategy and Action Plan

### **Summary of Key Recommendations**

Using the information gathered throughout phases 1 and 2 of this project, The Experience Advisors have made 19 recommendations under the headings of **People**, **Process**, and **Technology**. For full details on each recommendation, please refer to the attached strategy and action plan.

Embedded within those 19 recommendations, the consultants have identified 7 prioritized recommendations. These recommendations have been identified as key improvement opportunities that will have a significant impact on the County's customer experience moving forward. In addition, these 7 recommendations are foundational elements that must be implemented for subsequent improvement initiatives to be executed effectively.

The priority recommendations are as follows (please note the recommendation number refers to their order within the full list of 19 recommendations):

#### **People**

- 1. Design and Deliver Mandatory Service-Related Training Across the Organization*
  - Address identified gaps in skills/ competencies to drive more effective and efficient delivery of services
  - Currently there are varying levels of service-related knowledge and skills among staff and minimal service-related training and development opportunities
- 4. Define a Customer Issue, Complaint and Escalation Policy/ Procedure*
  - Define a clear escalation process and procedure for incoming issues, inquiries and complaints and escalation from customers. This will need to align with internal teams, cross functional teams and in collaboration with Council.
  - Customers may escalate complaints/ requests when they do not like an answer provided. Due to the lack of standardized and practiced escalation processes, it is common to see customers escalate issues directly to Council members without going through proper issue-resolution processes.

## Process

### 9. *Enhance Centralized Customer Service Function for ServiceNorfolk*

- Further build on existing centralized customer service desk model to provide consistent, high quality service experiences to customers through all interaction channels (in-person, over the phone, online and through email)
- The defined Customer Experience Strategy vision, mission and guiding principles should be delivered consistently across all channels from one central geographical location. Important note regarding one central geographical customer service desk location:
  - The recommendation to move to one central location would mean the ultimate closure of the Delhi Administration Building (DAB) in-person customer service desk. This move would include the centralization of the ServiceNorfolk phone team with the in-person customer service desk. .
  - Staff are not recommending the closure of DAB at this time, however, are committing to return to council at the end of 2024 with an annual Customer Service Update that will include a review of in-person customer visits and volume at DAB.
- To effectively implement and manage the Customer Experience Strategy and Action Plan, it is recommended that a Customer Experience Coordinator position be created to ensure the successful implementation and management of these elements to continue improving the customer experience at the County. Please see details below under Designated Staffing Resource

### 10. *Develop Customer Experience-related Service Level Agreements and Standards*

- Establish clear service level expectations and metrics for internal/external activities. These include metrics and responsibilities for Departments collaborating for customer needs as well as external metrics for interacting directly with customers

### 11. *Develop a Customer Experience Measurement Framework*

- Define a framework aligned to corporate KPI's (key performance indicators) including technology solution and governance
- Leverage the recommended customer feedback and operational metrics to build a "score card" that can be reported on to track/ measure progress and performance against overall customer service goals

## Technology

### 14. *Enhance CRM Sophistication and Functionality*

- Fully utilize the current salesforce CRM system by ensuring consistent and standardized usage with enhanced integration with other solutions and systems across the Corporation

- Assess future opportunities to leverage the CRM across all departments that interact with customers to streamline processes and improve efficiency internally
- To ensure a seamless expansion of the CRM, there is an opportunity to hire a designated Customer Experience Coordinator (as outlined in priority recommendation #9) who would oversee activities related to CRM enhancements. Please see details below under Designated Staffing Resource

#### *15. Enhance After Hours/ 311 Capabilities*

- Build on current partnerships with third-party call centre operations Current level and types of services able to be completed after regular business hours are minimal causing an increased amount of voicemail/ email messages waiting in the mornings to be actioned by customer service staff
- Investigate opportunities to align with other municipalities by introducing the 311 phone service to create a toll-free central hub to access Norfolk services from all geographical areas within the County

### **Designated Staffing Resource**

As outlined in the attached Customer Experience Strategy, comparable municipalities often struggle to implement similar strategies effectively due to the lack of a dedicated resource to lead the program. They often find themselves relying on existing resources performing “side of the desk” tasks that get deprioritized or not completed due to other focuses and workloads.

During the Council presentation, the consultant from the Experience Advisors noted for Council that a new, permanent full-time dedicated staffing resource is required to ensure the successful implementation of this corporate initiative. A dedicated resource will ensure the success of this strategy by driving the initiative forward, securing staff buy-in and ensuring accountability through regular updates to Council.

The Customer Experience Coordinator will work closely with various internal and external stakeholders to ensure the effective implementation and corporate roll-out of this strategy and action plan. This role will work collaboratively with Department and Division designates to develop and strengthen processes that support a customer-focused service experience while supporting customer experience improvement projects and initiatives that positively transform the end-to-end experience for Norfolk County customers. This role will also act as a project lead for the continued growth and enhancement of the CRM software system, identifying service-level gaps while creating efficient and streamlined solutions across the corporation.

This dedicated staffing resource will focus on key deliverables, using the prioritized recommendations above to start moving the strategy forward.

The key priorities for the Customer Experience Coordinator in the immediate term include:

- In conjunction with Human Resources, design and deliver mandatory customer service training across the corporation to all existing employees as well as new staff as they are on-boarded
- Identify key performance Indicators (KPI's) and customer experience metrics/ trends to report back to Council on a regular basis
- Design customer feedback, complaint and escalation policy/ processes along with clearly defined service level agreements (SLA's) between operating areas
- Continued growth and enhancements of the CRM software system

As the 2024 levy supported operating budget has already been approved and this request for a new full-time staff was not included, a business case for a New Budget Initiative (NBI) will be created and submitted for the Customer Experience Coordinator for the 2025 budget. This request will be reviewed and ranked alongside all other NBI's across the Corporation.

Without a dedicated resource for 2024, staff in Corporate Services will assess the level of work within the Strategy that can begin to be actioned this year with existing staffing levels and/or available salary gapping. It is noted that this will be limited.

The completion of this strategy is just the start of Norfolk's journey to improving the customer experience. This is a multi-year initiative with 19 separate recommendations, each with varying levels of complexity; these recommendations will require time and resourcing to implement.

#### **Financial Services Comments:**

There are no direct financial implications of this report. Staff will accommodate as much as possible within the approved 2024 Operating Budget and staffing complement.

The additional resource along with any additional operational funding required will be brought forward during the 2025 Operating Budget process, with a New Business Initiative. This NBI will be reviewed with all other NBIs brought forward for alignment with County wide priorities, needs and funds available.

#### **Interdepartmental Implications:**

The implementation of the Customer Experience Strategy will have operational impacts across the corporation as we look to provide exceptional customer experience internally to staff members and externally to customers, residents, and visitors to the County. A number of the recommendations include some degree of operational change in how some areas of the corporation will deliver services internally to other Departments and Divisions and externally to our customers.

Change management and risk mitigation strategies have been included as part of the strategy and action plan and will be continually referenced as the strategy is implemented. Based on the positive feedback received in consultation with Staff, there are no anticipated negative implications affiliated with the strategy and action Plan.

### **Consultation(s):**

This report was written in consultation with the General Manager, Corporate Services, Director, Corporate Customer Service and Communications, Supervisor, ServiceNorfolk, Manager, Financial Planning and Reporting, Treasurer/ Director, Financial Management and Planning, Director, Human Resources and the Senior Leadership Team.

### **Strategic Plan Linkage:**

This report aligns with the 2022-2026 Council Strategic Priority Serving Norfolk - Ensuring a fiscally responsible organization with engaged employees who value excellent service.

Explanation: The Norfolk County Customer Experience Strategy aligns with the Serving Norfolk strategic priority. In an effort to strengthen communication and service delivery, the successful roll-out and implementation of the strategy will improve how Norfolk communicates and delivers our services to the community both through our digital and in-person service channels.

### **Conclusion:**

Norfolk County is dedicated to building a vibrant and strong future for all residents by providing valued public services that are responsive to community needs. In order to achieve this, in collaboration with the Experience Advisors, the County has developed the attached Customer Experience Strategy and Action Plan to define how we will provide access to consistent, reliable, efficient and effective services where, when, and how customers want it. Staff are excited to get started on this important initiative.

### **Attachment(s):**

- Norfolk County Customer Experience Strategy and Action Plan

### **Approval:**

Approved By:  
Al Meneses, CAO

Reviewed By:  
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