![Norfolk County logo]

Customer Experience Strategy and Action Plan

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# Table of Contents

Executive Summary

Document Purpose

The purpose of the document is to outline and formalize a comprehensive Customer Experience Strategy for Norfolk County. This strategy will serve as a guiding framework for all operating areas within the County to enhance the overall experience for both internal stakeholders (employees) and external customers (residents, businesses, visitors, etc.).

## Norfolk County CX Strategy and action plan aims to provide:

CX vision, mission, values and guiding principles

Define the vision, mission, values, and guiding principles of customer experience for Norfolk County, aligning them with the county's overarching goals and objectives.
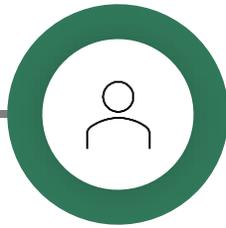
Improvement Areas

Identify focus areas, goals, outcomes, and actions to improve customer experience across various touchpoints and services provided by the county.
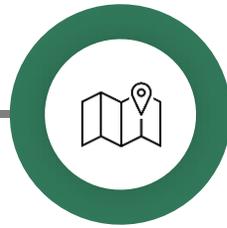
Charters

Establish clear expectations and commitments through customer and employee charters, outlining the responsibilities and standards for both parties.
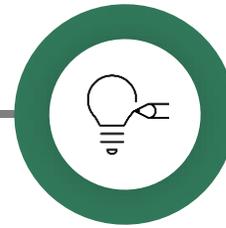
Service Standards

Set service level standards for all channels to ensure consistency, efficiency, and responsiveness in addressing customer inquiries and requests.

Recommendations

Provide detailed recommendations on key focus areas to enhance overall CX at Norfolk County.

Document Terminology

Throughout the document, key terms are used with specific meaning for the purposes od this project. Below, are the respective definitions to the key terms throughout the document.

Operational Definitions

Customer
Refers to both external public / community members and internal employees / stakeholders. The primary focus when thinking about a Customer Experience (CX) Strategy is on the external public / community members, however the concepts are relevant and applicable to internal employees as well.

Centralization
Refers to a singular customer service function operating in the same location and providing a singular entry point with one team responsible for customers across all interaction channels (i.e., in-person, phone, email, social media, mail).

First Contact Resolution
Refers to the ability for Norfolk County to resolve a customer need (i.e., close a case / work order / inquiry) in real time via phone or with a single reply via email, social media.

Service Level Agreements (SLAs)
Formal policies and procedures outlining the collaboration and commutation expectations between 1) internal employee teams / departments, and 2) with external customers.

Key Performance Indicators (KPIs) / Metrics
Refers to quantifiable performance measurements that are tracked by the county through internal systems and/or customer feedback survey, used to measure the key elements related to customer service / experience so that actions can be made to improve as necessary.

Response / Reply
Refers to employees providing a written or verbal acknowledgement to stakeholders. This does not mean that the interaction / issue / inquiry is "closed".

Project Purpose and Goals

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.**

To do so, the County has developed a **Customer Experience Strategy and Action Plan to define how they provide access to consistent, reliable, efficient, and effective information where, when, and how customers want it.**

The strategy also serves as a **guide, outlining expectations for both employees and customers.**
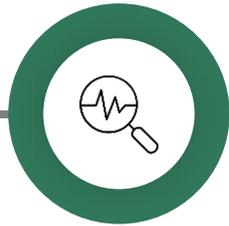
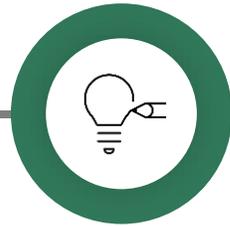## Key Outputs of this Important Initiative Include the Following.
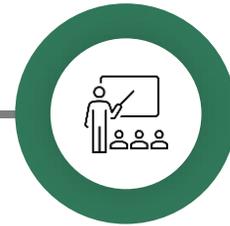
Service Inventory	CX Maturity Model	Analysis Report	CX Strategy and Recommendations	Action Plan

Research Methodology

Below is a list of research activities completed, undertaking a comprehensive approach utilizing a mix of sources for a deeper and holistic understanding of Norfolk County's current CS/CX landscape.

Research Methods

The following research methods were utilized to gather data and insights for the development of the customer experience strategy for Norfolk County.

1. Literature Review

Understand the current-state customer-service landscape across all divisions / departments.

Existing Document Review	On-site Research
Jurisdictional Scan	Service and IT Landscape Assessment

Secondary Research

2. Stakeholder Interviews/Engagement

Engage internal employees and external stakeholders for their unique perspectives and feedback.
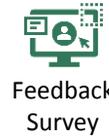
Employee Engagement	Feedback Survey	Interviews	Group Workshops
Customer Engagement	Feedback Survey		

3. Visioning Workshops

Co-develop the CX Strategy and Action Plan required for effective long-term customer service transformation.

Technical Project Team engagement	Vision Workshops
Council engagement	Vision Workshops

Primary Research

Research Rigor

The research methods employed were exhaustive, ensuring a comprehensive exploration of customer experience dynamics. Thematic analysis was rigorously conducted, allowing for in-depth examination of recurring patterns and insights. Through these rigorous methodologies, reliable and actionable findings were obtained to inform the development of the CX Strategy, Recommendations, and Action Plan.

Summary of Major Outputs

The below outlines the various phases undertaken during the project, activities performed and major outputs and deliverables

PHASE 1: Current-State Assessment

The following activities were completed during this phase

- Gathering and initial review of existing documents and policies
- Review of current channels and knowledge management
- Jurisdictional Scan and industry Best Practice benchmarking
- Onsite research

PHASE 2: External and Internal Engagement

The following activities were completed during this phase

- Conducted 25+ employee 1:1 interviews
- Conducted 5+ employee group workshops
- Deployed 1x Employee survey
- Deployed 1x Customer survey
- Conducted 1x Technical project team visioning workshop
- Conducted 1x council visioning workshop
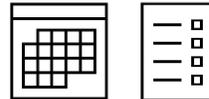
PHASE 3: CX Strategy and Implementation Plan

The following activities were completed during this phase

- Performed comprehensive data analysis
- Created a summary of analysis from all research activities
- Utilized the insights for the analysis report draft the initial versions of the CX strategy and action plan
- Incorporate stakeholder feedback and revisions into the final versions of the CX Strategy and Action Plan

Major Outputs

- ✓ Jurisdictional Scan
- ✓ Service Inventory

- ✓ CX Maturity Model
- ✓ Analysis Report

- ✓ CX Strategy
- ✓ Action Plan

Summary of Employee Research Findings
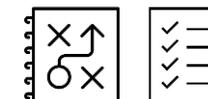
Customer Findings

People

Desire to be treated well

- There is a desire to be treated in a friendly and respectful demeanor my Norfolk Staff.
- Customers believe that accountability and knowledge are critical attributes to great experiences.
- Customers desire information that is easy to access and easy to understand
- There is a strong desire for openness and transparency.
- A major gap in satisfaction stems from the ability for employees to resolve issues (often wanted at the first point of contact).

Process

Lack of Standardized Customer Service Expectations

- Challenges such as ineffective communication and delayed responses indicate potential process inefficiencies in customer service delivery.
- There is a significant satisfaction gap in effective issue resolution which is a critical aspect of building strong relationships with people / organizations that are interacted with.
- There is much higher expectation than what is currently experienced from customers to have faster turnaround times for communication through phones and email.

Technology

Desire to Improve Customer Service Tools

- Information is not easy to find on the county website, customers desire easier and better self-management / access to information.
- There is a desire to have self-serve options for procedures such as license applications, payments etc.
- Customer want the County to know them, their situation and their past interactions. They do not want to have to continuously retell their stories to different employees or start from the beginning every time they interact.

Summary of Employee Research Findings

Employee Findings

People

Lack of Collaboration Between Teams

- Departments work in siloes without cross-department collaboration.
- There is a lack of knowledge sharing between teams and with leadership.
- Communication from leadership regarding service expectations and new processes is not always clear.
- It is unclear which team to direct customers to in order to resolve questions / issues during day-to-day interactions.

Process

Lack of Standardized Customer Service Expectations

- There is a lack of standardized customer service standards, expectations and responsibilities across different roles.
- Inconsistencies across departments for service standards and processes are common.
- A critical need exists to streamline processes and protocols, ensuring clarity and efficiency in service delivery.
- There are no formal Key Performance Indicators (KPIs) to measure customer service effectiveness and monitor progress over time.

Technology

Desire to Integrate technology and improve tools

- There is a need for integrated technology solutions that streamline workflows and customer information.
- Enhancements such as automation, self-service portals, and more sophisticated CRM systems are desired to facilitate efficient service delivery.
- Improved phone systems data reporting and online platform integration to CRM are needed to facilitate smoother communication and information sharing both internally among departments and externally with customers.

Summary of Priority Recommendations

The below recommendations have been identified as the key improvement opportunities that will have significant impact on the County of Norfolk's Customer Experience moving forward. These are foundational elements that must be put in place I order for subsequent improvement initiatives to be able to be executed effectively.

A full list of all identified recommendations can be found in the supplementary Analysis Report prepared for the County.

People

#	Recommendation
1	Design and Deliver Mandatory Service-Related Training Across the Organization.
4	Define a Customer Issue, Complaint and Escalation Policy / Procedure.

Process

#	Recommendation
9	Enhance Centralized Customer Service Function for ServiceNorfolk.
10	Develop CX-Related Service Level Agreements & Standards.
11	Develop a CX Measurement Framework.

Technology

#	Recommendation
14	Enhance CRM Sophistication and Functionality
15	Enhance After Hours / 311 Service Capabilities

What are shown on this page are the Priority Recommendations.
Additional recommendations identified through this initiative can be found on page 55 and outlined in the Action Plan.

Customer Experience Strategy

Customer Experience Strategy Framework

Below outlines core elements of a Customer Experience Strategy Framework including the Vision, Mission, Values, and Guiding Principles.
Each section will be addressed in this report, followed by recommendations

Service Vision
Overarching "aspirational statement" for organizational Customer Experience at the County.

Service Mission
The mission statement defines an organization's purpose or reason for improving customer experience.

Values
Core ideals / attributes that guide the County in fulfilling its mission and turn the vision into a reality.

Guiding Principles
Pillars / guidelines used by employees to define how the County delivers Customer Experience in a coherent way.

Service Vision
What we aspire to be

Service Mission
Why we exist

Values
How we build culture

Values
How we build culture

Values
How we build culture

Values
How we build culture

Guiding Principles
How we achieve our Values

Guiding Principles
How we achieve our Values

Guiding Principles
How we achieve our Values

Guiding Principles
How we achieve our Values

Customer Experience Strategy

Service Vision

Be a trusted partner to our community and support our residents to live and grow with the County.

Service Mission

We are the voice, face, and spirit of the County, empowering the community to successfully interact with services.

Values

Guiding principles

Available

Collaborate through varied channels to be there for the community when needed.
- Prioritize Customer Experience for all Roles.
- Offer Omnichannel Interactions.
- Provide Accessible Services.

Transparent

Be open and honest, taking accountability for community members' needs.
- Communicate Openly.
- Manage Expectations of Community Members.
- Keep the Community Engaged.

Empathetic

Cultivate trusting relationships and get to know the community.
- Understand Community Members to Better Address their Needs.
- Listen Actively when Having Conversations.
- Be Professional, Friendly and Caring in Every Interaction.

Consistent

Deliver services in a standardized and predictable way, every time.
- Define and Maintain Service Standards
- Document Policies and Procedures.
- Simplify Interactions to Reduce Errors and Remove Complexity.

Innovative

Continuously improve and strive for new, better ways of serving the public.
- Leverage Technology to Streamline Experiences.
- Upskill and Reinforce Key Skills / Knowledge.
- Manage and Track CX Performance.

Values and Guiding Principles

AVAILABLE: *Collaborate through varied channels to be there for the community when needed.*

- **Prioritize Customer Experience Across All Roles:** Commit to delivering great service experience as a priority responsibility of every role at every level across Norfolk County employees.

- **Offer Omnichannel Interactions:** Empower community members with multiple interaction channels such as phone, email, in-person, and digital self-serve assistance so they can choose what they prefer.

- **Provide Accessible Service:** Ensure that public services, facilities, and events are designed and organized in a way that accommodates the diverse needs of all community members

TRANSPARENT: *Be open and honest, taking accountability for community members' needs.*

- **Communicate Openly:** Promote an openness to information, sharing, updating, and long-term planning with community members at every interaction, whether good or bad.

- **Manage Expectations of Community Members:** Setup interactions for success by clearly explaining the realistic activities, timelines and next steps with the community.

- **Keep the Community Engaged:** Effectively collaborate and involve internal colleagues and external community members to provide opportunities for discussion and information sharing.

EMPATHETIC: *Cultivate trusting relationships and get to know the community.*

- **Understand Community Members to Better Address their Needs:** Get to know the people we interact with both personally and professionally through conversation and documenting details about them.

- **Listen Actively when Having Conversations:** Actively listen to the communities and people issues / inquiries with whom we interact without judgment or frustration.

- **Be Professional, Friendly and Caring in Every Interaction:** Align "words" with "actions" to minimize the say-do gap and deliver/ manage service interactions that are always as expected by those involved.
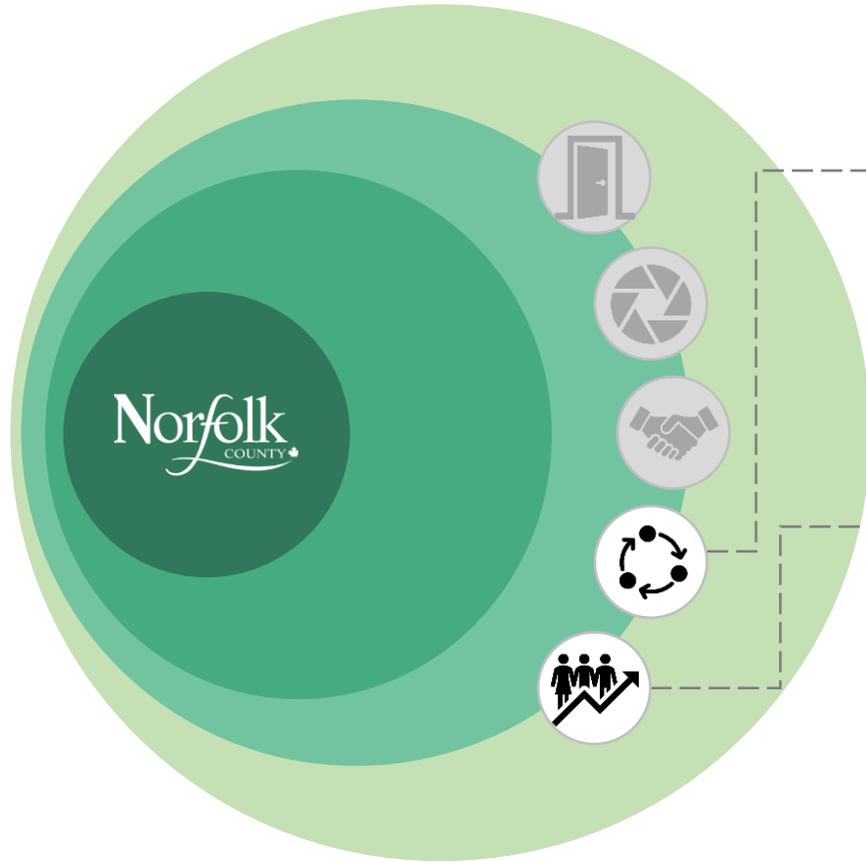
Values and Guiding Principles

CONSISTENT: *Deliver services in a standardized and predictable way, every time.*

- **Define and Maintain Service Standards:** Define internal and external service standards that are known across the organization and updated as customer needs and expectations change.

- **Document Policies and Procedures:** Provide clear and concise documentation for key service elements such as processes, protocols, and activities that employees can leverage / reference.

- **Simplify Interactions to Reduce Errors and Remove Complexity:** Provide clear information that is simple and easy to access for completing tasks and interacting with the County so they can be followed by community members the same way, every time they connect with the County.

INNOVATIVE: *Continuously improve and strive for new, better ways of serving the public.*

- **Leverage Technology to Streamline Experiences:** Streamline service processes and interactions to be intuitive and automated so they can be learned and completed with minimal effort. Continuously leverage opportunities to modernize or automate service processes / tasks that decrease manual time / effort.

- **Upskill and Reinforce Key Skills / Knowledge:** Build employee skills and knowledge through effective and continuous CX / Soft-Skill related training to empower us with the competencies to deliver on our CX Vision.

- **Manage and Track CX Performance:** Track and report on "one-time" and "longitudinal" service experience related metrics / key performance indicators to continuously measure success and identify areas of improvement as the community's expectations change.
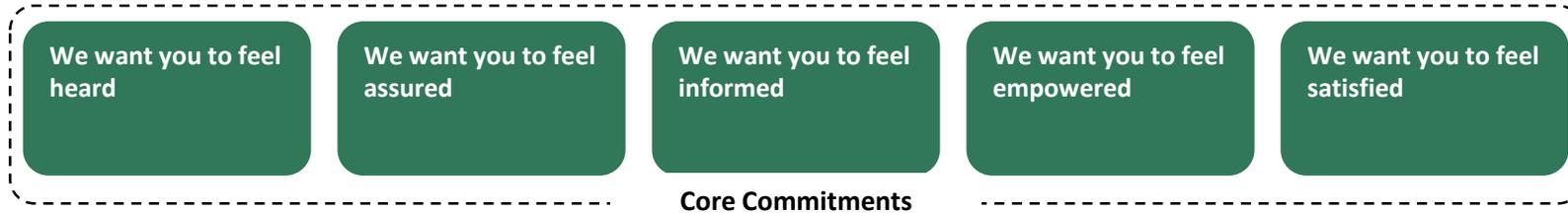
Customer and Employee Charter

Legend of Employee and Customer Charter

Norfolk COUNTY

The Customer Service Charter serves as a guiding document outlining the commitments and standards to ensure excellent customer service providing a clear framework for both customers and employees, defining expectations and responsibilities in all customer interactions.

Employee and customer charter : Overview

When customers interact with the County, we have identified how we want the county staff and all customers to feel , we have developed five core commitments with actionable behaviors that can be expected from both the customers and employees. This framework acknowledges the active role our customers play in order for the county to deliver services effectively

Five core commitments for service excellence

| We want you to feel heard | We want you to feel assured | We want you to feel informed | We want you to feel empowered | We want you to feel satisfied |

Core Commitments
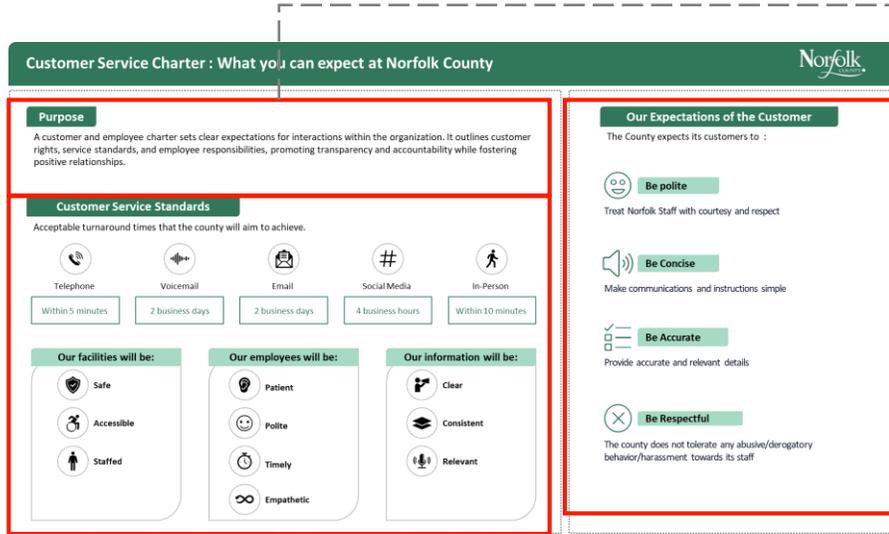
CHARTER PURPOSE

- **To establish clear expectations**: The charter articulates the level of service customers can expect, including response times, communication channels, and problem resolution procedures.
- **To enhance customer satisfaction**: By setting and meeting service standards, the charter aims to improve overall customer satisfaction and loyalty.
- **To empower employees:** The charter provides employees with guidelines and resources to deliver consistent, high-quality service, empowering them to resolve issues effectively.

USE OF CHARTER

- **Reference for customers**: Customers can refer to the charter to understand their rights, responsibilities, and available support options when seeking assistance.
- **Training tool for employees:** The charter serves as a training resource for employees, helping them understand company service standards and best practices for customer interactions.
- **Performance measurement:** The charter establishes benchmarks and metrics against which customer service performance can be evaluated, enabling continuous improvement initiatives.

Legend of Employee and Customer Charter

The below slide outlines the various sections present in the employee and customer charter and what each section entails

Purpose of Charter

- ✓ The purpose section outlines the overarching objective of the charter. It communicates Norfolk's commitment to providing exceptional service and ensuring customer satisfaction.
- ✓ This section is a brief outline of why the charter exists and how it can be used to enhance service delivery at Norfolk

Customer expectations

- ✓ This section is a visual representation describing the expectations that Norfolk has of its customers, emphasizing the importance of mutual respect, cooperation, and effective communication.

Customer Service Standards

- ✓ This section describes the high-level summary for what standards that Norfolk will commit to when interacting and delivering services to the public.

Customer Service Charter : What you can expect at Norfolk County

Purpose

A customer and employee charter sets clear expectations for interactions within the organization. It outlines customer rights, service standards, and employee responsibilities, promoting transparency and accountability while fostering positive relationships.

Customer Service Standards

Acceptable turnaround times that the county will aim to achieve.

Telephone	Voicemail	Email	Social Media	In-Person
Within 3 minutes	1 business day	1 business day	4 business hours (direct message)	1-2 minutes

Our facilities will be:
- Safe
- Accessible
- Staffed

Our employees will be:
- Patient
- Polite
- Timely
- Empathetic

Our information will be:
- Clear
- Consistent
- Relevant

Our Expectations

The County expects all customers and employees to:

Be polite

Treat everyone with courtesy and kindness

Be Concise

Make communications and instructions simple

Be Accurate

Provide accurate and relevant details

Be Respectful

Promote a respectful environment for everyone, at every interaction. Any form of abuse will not be tolerated. Those in violation will be asked to correct their behaviour

Employee commitments and approach

Below outlines the values and guiding principles to achieve them

Our commitments

Accessibility
At Norfolk County, accessibility is more than a goal—it's a commitment. We continuously strive to ensure that our facilities, services, and programs are accessible to all individuals, regardless of their abilities.

Transparency
The county strives to be open and transparent in all we do, we will try to keep you informed our services, any changes and where we are in the process of the resolution of your complaints and queries.

Empathy
We prioritize understanding and compassion in our interactions with residents, employees, and visitors alike. Through active listening, support networks, and initiatives that promote kindness and understanding.

Consistency
We encourage consistency and clarity in all our actions by maintaining high standards, we aim to build trust, enhance accessibility, and empower our residents.

Improvement
We believe in providing individuals with the resources, support, and opportunities they need to continuously improve. This is achieved through greater self-refection.

Our Approach

1 **Commit to serve**
- ✓ Treating all with respect
- ✓ Focusing on what can be done
- ✓ Being flexible and accommodating

2 **Commit to transparency**
- ✓ Keep the customer informed
- ✓ Escalating to the most appropriate person
- ✓ Use simple language

3 **Commit to understand**
- ✓ Listen actively
- ✓ Listen without interruption and ask questions
- ✓ Being empathetic and taking notes

4 **Commit to efficiency**
- ✓ Use consistent and clear messaging
- ✓ Providing explanations wherever needed
- ✓ Provide reasons for decisions or delays

5 **Commit to work with you**
- ✓ Being thorough and striving for excellence
- ✓ Learning from our mistakes
- ✓ Putting the customer first

Prioritized Recommendations

Summary of Priority Recommendations

The below recommendations have been identified as the key improvement opportunities that will have significant impact on the County of Norfolk's Customer Experience moving forward. These are foundational elements that must be put in place in order for subsequent improvement initiatives to be able to be executed effectively.

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People

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People   1   Norfolk COUNTY

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	Design and deliver mandatory organization-wide training program to address identified gaps in skills / competencies to drive more effective and efficient delivery of services.
Rationale	Currently there are varying levels of service-related knowledge and skills among staff and minimal service-related training and development opportunities. The lack of training translated into increased time and effort to perform activities, rework from errors, inefficient use of current tools and inconsistent processes for how services are delivered to customers causing duplication of effort.
Details	This training plan has been developed to enhance the knowledge, skills, and awareness to develop a customer-centric culture at Norfolk County. The training plan includes Learner Profiles, Training Categories, and proposed Training Courses. Training curriculum can be facilitated in house by Norfolk employees; however, it is suggested that this new training program be designed and delivered in collaboration with a third-party vendor to ensure that the level of quality and therefore skills / behaviors development is anchored into Norfolk employees. **Learner Profiles** Learner Profiles are used to identify the right resource for the right training. Four Learner Profiles have been identified for Norfolk County. Each learner is aligned to a role-level or function that will impact the knowledge, content, and training required. Note: these definitions are meant to be used for the purpose of grouping employees for training purposes and include all staff.

Learner Profile	Description
Executive	Executive-level decision makers and individuals focused on strategic direction of the organization; General Manager-level and above.
Primary Support	Roles that provide primary support to employees and are responsible for day-to-day management of operations; Management or Supervisors.
Individual Contributor	Non-management roles responsible for completion of day-to-day activities and service delivery and do not have direct reports.
Customer Service	Individual Contributor staff members across roles who are responsible for a distinct customer service functions.

Design and Deliver Mandatory Service-Related Training Across the Organization

> The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details

Training Categories and Proposed Courses
The following training categories have been identified to address organizational needs and gaps. These categories are used to organize the proposed training courses.

Training Category	Organizational Need / Gap Addressed
Customer Service Foundations	Lack of customer-centric culture and understanding of customer service expectations; Increase accountability to customer service expectations.
Workplace Skills	Inconsistent or inefficient use of organization-wide technology practices; Minimal training on technical programs or skills.
People Skills	Evolving need to address complex customer complaints or approach difficult situations; Need to support frontline employees with skills and tactics for difficult situations.

Customer Service Foundations: Customer Service Foundations defines what great service looks like at the County and provides learners with an overview of how that is achieved. This training provides the foundation and promotion of a customer-centric mindset and approach to service delivery.

Proposed Courses	Learning Objectives	Learner Profile
Customer Experience Foundations	• Learn the Customer Experience Strategy including the Customer Experience Mission, Vision, Values, and Guiding Principles. • Understand the Customer Service Policy and Service Standards and understand how it applies to your role. • Define what appropriate levels of customer service are at the County and understand how this applies to your role.	All
Understanding Who Our Customers Are	• Define who the County's customers are and understand unique customer needs or preferences.	All
Customer Service Representative Preparation	• Demonstrate a customer service approach and skills to handle customer inquiries. • Learn Customer Relationship Management practices and software. • Learn best practices and software for appointment scheduling.	Customer Service
Centralized Customer Service	• The centralized strategy / approach with the potential of the relocation of service desks. • Learn centralized process, triage best practices, service level agreements tools, and technology. • Learn in-person and digital protocols when interacting with customers.	Customer Service

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details

Workplace Skills: Workplace skills encompasses the technical, process, and operational skills an employee needs to be successful within their role. Workplace skills training provides new or existing employees to develop their skills and align with needs of the business. This training focuses on organization-wide needs, rather than role or department specific training.

Proposed Courses	Learning Objectives	Learner Profile
Using Department Tools	• Understand department programs, systems, and tools used within an individuals' department. • Learn the functionalities and features of digital tools used day-to-day to increase consistency.	All
Following Organizational Standards and Processes	• Understand organizational standards and processes when interacting with customers. • Meet organizational SLAs and complaint resolution processes.	All
Following Department Procedures	• Understand department procedures and best practices to perform department activities. • Define cross-functional roles and shared processes. • Meet department service standards and expectations for assigned tasks.	All

People Skills: People skills or soft skills are a combination of abilities related to people and social situations rather than a person's technical abilities. These skills are not industry or role-specific, rather skills that relate to personality and behavior and involve tactics that teach new behaviors and ways of thinking.

Proposed Courses	Learning Objectives	Learner Profile
Effective Communication	• Understand and apply communication theory. • Critically think about communication processes and messages. • Write effectively for a variety of contexts and audiences. • Interact skillfully and ethically. • Develop and deliver professional presentations. • Understand and apply techniques of conflict management and resolution.	All
Conflict Management and Resolution	• Understand how to recognize the causes of conflicts. • Understand harassment policy. • Explain how differences in communication styles can produce tense situations. • Apply solutions for managing cultural expectations and differences. • Remember tactics for better listening and resolution.	All
Motivating and Leading Teams	• Understand the process of conducting annual appraisals, how to use performance management tools, and use Key Performance Indicators. • Learn approaches to giving effective feedback and motivate employees.	Executive

Design and Deliver Mandatory Service-Related Training Across the Organization

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Considerations and Risks	Norfolk will need to consider what the specific Learner Groups will be and apply that to the training courses. The County should consider leveraging a third-party vendor to ensure that the level of quality of training is delivered, resulting in optimized skills / behaviours development.
Value / Benefit	• Increase employee knowledge and skills. • Improve customer experiences from interactions with enhanced quality and efficiency of service delivery. • Provide a more consistent service experience aligned to the overall goals and expectations of what great service looks like at the Town.

Define a Customer Issue, Complaint, and Escalation Process

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	Define a clear process and activities for incoming issues / inquiries and escalation and from customers. This will need to align with internal teams, cross-functional teams and collaborating with Council.
Rationale	Customers will escalate complaints / requests when they do not like the 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. There is an opportunity to better manage and track complaints in the CRM.
Details	**Establish Customer Issue, Complaint, and Escalation Process** It is important for the County to establish a Customer Issue, Complaint, and Escalation Process to handle incoming complaints from the community. Escalation procedures will need to be included for instances where customer issues are unable to be resolved by the employee or triaged team and require further attention. Norfolk will need to detail the following when building the Issue, Complaint, and Escalation Process at each phase:

Phase 1: Receive	Phase 2: Resolve / Triage	Phase 3: Escalate	Phase 4: Close
• The County should define how issues are received through different channels. • The County should define what the response time should be when an issue or complaint is received. • Customers should be acknowledged when submitting issues / complaints. Employees should send a receipt of complaint.	• Issues should be triaged with a warm transfer. A warm transfer occurs when an employee answers a call and transfers the call to a different employee while passing along any relevant information about customer / interaction. • The County should define what information needs to be included in the warm transfer. • The County should define what outgoing communication should occur with the customer e.g. about expected timelines and updates on status. • If the employee that receives the issue does not have access to the CRM, the issue should be handed-off to ServiceNorfolk to appropriately document the information in CRM and triage it to the right team.	• The County should define what the escalation path is for instances where customer issues are unable to be resolved by the employee or triaged team and require further attention. This should include reaching out to the higher levels of management or specialized teams to get advice on how to resolve the issue. • The County should define how to involve managers or specialized teams into customer interactions when needed.	• All complaints should be logged into the CRM system to ensure documentation and tracking. The County should define what information needs to be included e.g. details of the issue, date, customer information, and designated team. • It is important the individual creating the ticket should update the ticket with any updates, unless triaged to a different team in which case the triaged employee will need to make updates to the CRM. • The ticket should be formally closed when there has been a resolution.

Define a Customer Issue, Complaint, and Escalation Process

Norfolk COUNTY

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details	**Develop Formal Service Agreements (SLAs) for this process that includes impacted departments** Norfolk County should develop internal employee service agreements between ServiceNorfolk and individual departments. Within the Service Level Agreements, Norfolk will need to detail the following: • Roles and responsibilities between departments (e.g. who is responsible for contacting customers, inputting information in CRM, and conducting follow-up) • Length of time to resolve an issue or escalation • Length of time to follow up with customers • Hand-off of service issues / complaints • CRM documentation procedures **Integrate Issue / Complaint Process into Training** • The County should ensure processes are understood and standardized by incorporating Issue, Complaint and Escalation Process training. **Create and Share Documented Support Material** The County should create and share standardized process material to increase the consistency in knowledge and complaint handling among employees. This should include: • Process maps • Documented SLAs • Documented Issue, Complaints, and Escalation Processes • Documented guides and tools • Documented training material **A recommended flow of these activities has been provided to the County. The process map will need to be confirmed and aligned on by key stakeholders prior to the process being implemented.**
Considerations and Risks	Norfolk will need to consult Council to align on how escalations should be handled in the case that customers directly go to Council to raise issues.
Value / Benefit	• There is a standardized approach to handling and tracking customer complaints. • Ensure that complaints are captured through the CRM. • Increase transparency across the organization for customer issues • Decreased escalations / transfers by ensuring adequate knowledge is available to resolve simple inquiries

Enhance Centralized Customer Service Function for ServiceNorfolk

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	The County should further build on its existing centralized customer service desk to provide service experience to customers as a centralized function across all interaction channels. The defined CX Strategy vision, mission, and guiding principles should be delivered consistently across all channels.
Rationale	While the County has established a ServiceNorfolk Team with centrally located desks in key buildings, this model is not defined and being enforced consistently across all interaction channels. The enhancement recommendations include providing a single location to house all customer-facing and back-office Service Norfolk team members as well as streamlining the in-person process.
Details	

Old Locations

- Confusion with Service Desk Locations: Customer Service locations across various locations can cause confusion for customers for which location can support them with their specific service needs. Not all locations offer the same services to customers.
- Lack of Privacy for Phone Calls: Vulnerable populations lack privacy for phone calls, potentially compromising confidentiality.
- Absence of Private Waiting Areas: Customers lack a private waiting area, leading to discomfort and potential privacy concerns.
- Isolation from business units : Currently, customer service is siloed from Other Business Units, hindering Cross-Functional Collaboration

New Location

- Central Geographical Location: Buildings are available with a more convenient physical location, making it easily accessible for residents from various parts of the county, improving convenience and accessibility for customers and employees alike.
- Ample Space and Size: Buildings are available that offer more space and are larger than the current locations, providing the opportunity to accommodate growing needs, expand services, and enhance the overall experience for visitors.
- Ideal for Cross-Collaboration: Buildings are available with a more effective layout and design to facilitate cross-collaboration, making it easier for different departments to interact easily with customer service helpdesk

Customer Experience (CX) Coordinator Position: To effectively implement and manage (ongoing) the CX Strategy & Action plan, the enhancements to the Centralized Customer Service Function for ServiceNorfolk and the CRM Functionality (recommendation #14) additional full-time resource will be required. It is recommended that a position be made to ensure the successful implementation and management of these elements to continue improving the future of Customer Experience improvements within the County. Comparable Municipalities often struggle with effectively implementing CX Strategies because they do not have a dedicated resource to lead the program and rely on existing resources performing "side-of-the-desk" tasks which often get deprioritized or not completed due to other focuses and workloads.

Further description into the role and responsibilities of the Customer Experience (CX) Coordinator can be found in the appendix.

Enhance Centralized Customer Service Function for ServiceNorfolk

Visual Representation of Recommended Enhancements to Centralized Service Function.

Norfolk County will need to implement the following service structure / model to further enhance and support a centralized service model.

It is critical that all employees at each interaction channel are setup with the appropriate skills, documentation and tools required to deliver on the defined service levels to ensure the County can provide the same services and consistent experience regardless of what individuals may be contacting the County for.

Contact from Customers

ServiceNorfolk Customer Service Desk

ServiceNorfolk Contact Centre

Single Physical Location

Cross-Functional Departments

Council Members

Primary Responsibility

Execute Customer Need

Collaboration with Service Norfolk and other Departments / Stakeholders is dictated by Service Level Agreements (SLAs)

Track Customer Info

Key contacts within each department will need to be created to own and manage the inputting of customer interaction information into salesforce (when contacted directly).

Secondary Responsibility

Single Contact
Provide a single email, phone, social media, etc. contact (i.e., servicenorfolk@norfolk.ca, @servicenorfolk, 1-800...) into the County that is promoted / advertised to the public. Remove additional contact information from public facing channels and communications to maximize the number of first-contact interactions from citizens going through ServiceNorfolk.
Note: this does not mean that other direct phone lines and emails are completely removed and not available to be used when needed, just that they are not publicly promoted as a contact on public facing communications (i.e., website).
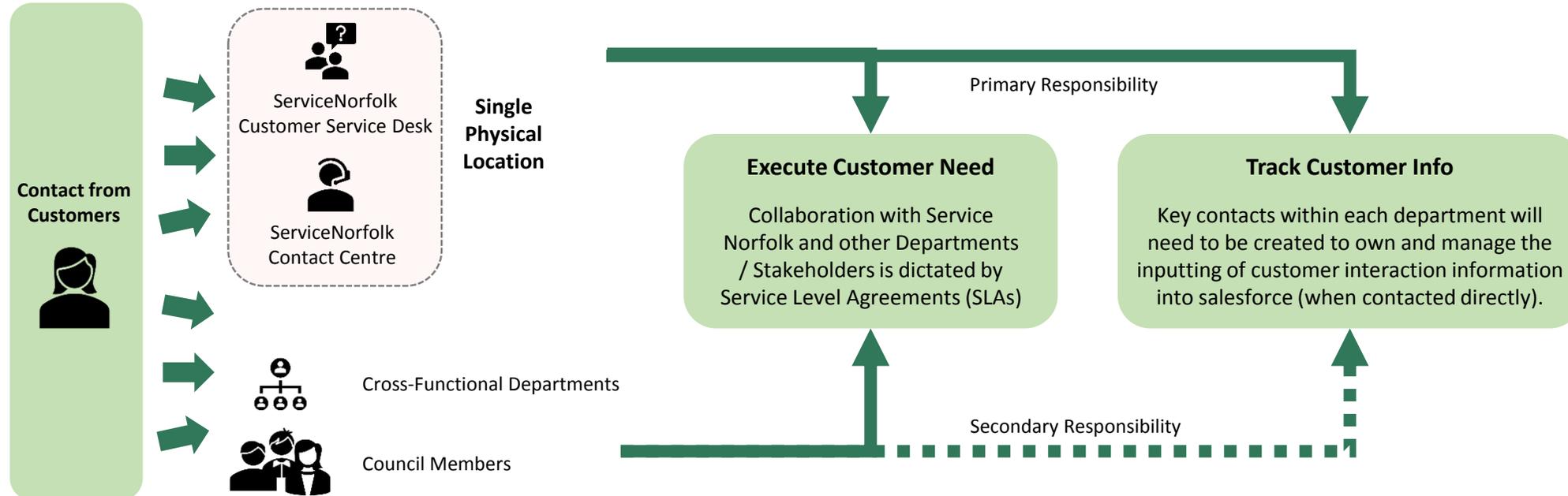
The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

| Details | Norfolk County will need to implement the following to support a centralized service model. |

In-Person Customer Interactions (Service Desk)
- **Centralized team to operate the desk:** One (1) centralized customer service desk in an appropriate location that has the following key characteristics.
  - Accessible to all citizens and stakeholders that utilize the location.
  - Sufficient space available to house both service desk and back-office contact centre service functions.
  - Adequate space to allow for 3-4 separate service "wickets" to allow for fluctuations in in-person interaction volumes.
    - o The Customer Service desk acts as the first point of contact for all customers entering the building in the main entrance of the appropriate location.
    - o Additional in-person service desks for ServiceNorfolk are currently very underutilized and therefore it is recommended that they be removed from public access. The County can integrate these resources into the centralized ServiceNorfolk team as well as explore the possibility of leveraging a full-time resource for the recommended Customer Experience Coordinator position.
- **Resources:** Coverage for the Service Desk is recommended to include at minimum two-three full-time, ServiceNorfolk Representatives at all times (during normal operating hours). Leveraging part-time resources can support the coverage of sick days, vacation, and lunch / breaks.
  - It is critical that all ServiceNorfolk CSRs be cross-trained across all service / interaction channels to allow for flexibility and coverage during fluctuations in volumes.
- **Operating Hours:** it is recommended that operating hours remain as Monday – Friday (8:30am – 4:30pm).
  - **After Hours Support**: All after hours emergency needs will continue to be answered by bearcom, a third-party telecom service provider. Enhancement opportunities for this after-hours partnership can be found in recommendation #8 Enhance After Hours / 311 Service Capabilities.
- **Roles and Responsibilities:** A ServiceNorfolk representative located at this counter / desk will be responsible for the intake of all in-person inquiry channels.
  - o Incoming inquiries are handled at the time of contact or triaged to the appropriate department or role as identified by department Service Agreements
  - o Customers are triaged from this desk to the appropriate team if needed.
  - o The Customer Service Representative will be required to take down information or metrics about the customer interaction completed in the CRM system.
  - o During the times when there are no in-person customers / citizens, customer service reps can support the contact centre team with digital / phone interactions (in between in-person interactions at the front desk).

Digital Customer Interactions (Contact Centre - phone, email, social media, mail)
- **Centralized team to operate the call centre function:** Creation of one (1) singular phone and email contact for ServiceNorfolk.
- **Resources:** Coverage for Digital Customer Interactions is recommended to include at minimum five (5) full-time, ServiceNorfolk Representatives available.
  - It is critical that all ServiceNorfolk CSRs be cross-trained across all service / interaction channels to allow for flexibility and coverage during fluctuations in volumes.
- **Operating Hours:** it is recommended that operating hours remain as Monday – Friday (8:30am – 4:30pm).
  - **After Hours Support**: All after hours emergency needs will continue to be answered by bearcom, a third-party telecom service provider. Enhancement opportunities for this after-hours partnership can be found in recommendation #8 Enhance After Hours / 311 Service Capabilities.
- **Roles and Responsibilities:** ServiceNorfolk Representatives act as the first point of contact for all customer contacts (calls, emails, and social media) through the Norfolk channels.
  - o Incoming inquiries or requests are handled at the time of contact or triaged to the appropriate department through a warm transfer. A warm transfer occurs when the Customer Service Representative answers a call and transfers the call to a different employee while passing along any relevant information about customer / interaction.
  - o The Customer Service Representative will be required to take down information or metrics about the customer interaction completed in the CRM system.

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Considerations and Risks	• ServiceNorfolk Team should consult other departments they collaborate with to define inter-department Service Agreements aligned to this modified structure / model.. This will outline the expectations and service level agreements (SLAs) between the Customer Service Representative and individual departments. This will need to be documented and shared between all collaborating teams. • Aligned to developing formal Service Level Agreements and Standards, Norfolk County must establish protocols and guidelines for consistent communication across all channels including scripts, email templates, and communications guidelines for each channel (in-person, calls, emails, and social media) that employees will be able to leverage. • Aligned to developing formal complaints and escalation processes, Norfolk County must develop and share escalation procedures for customer complaints. All complaints should be logged into the CRM system to ensure documentation and tracking. If complaints are unable to be resolved directly through the ServiceNorfolk agent, they should be escalated to the team manager. • It is imperative that the County be able to accurately track and understand cost per interaction so that we are actively tracking the cost for in-person, email, socials, phone, etc. This need is addressed in recommendation #6 Develop CX Measurement Framework
Value / Benefit	• **Empowered Employees**: Employees have the tools and support needed through established protocols and supporting materials that can be referenced and used to guide interactions with customers. • **Improved inter-departmental Collaboration**: Inter-departmental SLAs will be established to ensure there are defined procedures between collaborating teams. • **Consistent Customer Experience**: Protocols are established to identify best practices, guidelines, and templates that employees will be able to leverage in order to support customers in a consistent manner. Scripts, templates, and guidelines are available for employees to provide improved and consistent messaging to customers. • **Efficient Service Delivery**: removal of current service desk in Delhi will allow for the centralized team to provide more efficient services and responses to customers. The current location is very underutilized and therefore is not an impactful channel to a significant number of customers. The further enhancements to digital channels can provide these customers with the same level of service through alternative (not in-person) channels. • **Central Location**: The ideal location for this centralized desk is one that is centrally located within Norfolk that is easily accessible to the community. • **Centralized Service Model**: A centralized model is used to streamline processes for enhanced efficiency of service by decreasing transfers, improving customer wait times and delays. This will assist in the flow of complaints into departments from a single source, alleviating internal department pain points associated with customer service. • **Improved customer communication**: A centralized location offers a single point of contact for customers, who can be transferred to the appropriate department for service, if required. • **Seamless Collaboration between teams**: Communications, ServiceNorfolk and Clerks teams are centrally located and are better able to collaborate with one another. • **Customer access to additional departments**: Clerks and finance departments will now be able to answer public inquiries and coordinate customer interactions face-to-face. • **Improved analytics and error reduction**: A centralized location makes it easier to gather data for analysis, and to address errors and other issues quickly.

Develop CX-Related Service Level Agreements & Standards

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	Developed formalized CX-Related Service Level Agreements & Standards to establish clear service level expectations and metrics for internal / external activities. These include internal metrics for employees collaborating for customer needs as well as external metrics for when interacting directly with customers.
Rationale	There are no or limited CX-Related Service Level Agreements & Standards currently within the County. The ones that exist are not standardized and consistently followed across the organization.
Details	Aligned to the newly designed CX Strategy, the CX-related Service Level Agreements & Standards must provide the County with tactical expectations that support everyone on bringing the Strategic Guiding Principles to life.

A service Level Agreement is a formal agreement between two parties that support how they interact with one and other. Looking at both the internal metrics for employees collaborating for customer needs as well as external metrics for when interacting directly with customers, elements to be included within the Service Level Agreements (SLAs includes the following.

It is important that a "case" be created in the salesforce CRM system for all customer interactions to ensure there is adequate capture and tracking of customer contacts. This will also allow for information to be referred to by other County employees for any required follow-ups from customers.

Internal SLA's	**External SLA's**
• Services to be completed by the department vs services to be delivered by ServiceNorfolk. • Criteria for when ServiceNorfolk will transfer customers to different departments. • Roles & responsibilities for inputting collected customer information into salesforce CRM. • Standards for communications. • Standards for completing collaboration activities (responses and replies).	• General commitments to customer experience / service that will be adhered. • Information required to be captured from customers at every interaction. • Accessibility, Diversity, Equity, and Inclusion Practices. • Standards for communications. • Standards for completing collaboration activities (responses and replies).

Additional details into the CX-Related Service Level Agreements & Standards can be found in Appendix II.

Develop CX-Related Service Level Agreements & Standards

External SLA & Standards example: Customer Communications & Responses

Details		Service Level	Standard
	In-Person	• All customers will be acknowledged politely and professionally when entering any County facility and/or when interacting with any staff member (i.e. on site, in homes, while in community, etc.). • Appropriate service, direction, or information will be provided in a timely and courteous manner. • In-person transfers to the appropriate team members form ServiceNorfolk will be conducted aligned to the transfers conducted via Phone.	• 1-2minutes (as soon as possible at high-volume peaks)
	Phone Call	• ServiceNorfolk retrieve customer calls within this time if possible or will provide callers a warm transfer to the correct role. Callers will not be transferred to another line or voicemail without being made aware of the transfer taking place. • In the case that a telephone call is missed, and there is no voicemail, it is not expected that County employees return the call (based off caller ID in the telephone system).	• Within 3 minutes • (as soon as possible at high-volume peaks)
	Voice Mail	• Voicemail messages will include operating hours and an alternative contact methods in which customers can use to connect with the County prior to getting a reply in response to their message.	• 1 business day
	Email	• Vacation, absence, and out-of-office messages will be activated and will provide a back-up contact name and information while out of the office. • Out-of-office messages will be directed to the appropriate County team member with the knowledge to support the specific types of customer inquiries and not always to ServiceNorfolk (unless otherwise defined within the Service Level Agreement.	• 1 business day
	Social Media	• All social media inquiries that require County response (e.g., complaints or inquiries through direct message) will be acknowledged within 2 4 business hours. An acknowledgement means that there is a reply to the inquiry and does not mean that the interaction has been resolved / closed. • Any interactions through this channel that cannot be "closed" within 4 business hours will be taken off social media and employees will collaborate with customers via other channels until resolved.	• 4 business hours
	Written / Mail	• All written correspondence (i.e., postage, fax, hand delivered messages) will be stamped with a 'Received' date stamp on the day that it is received by the County. • Written correspondence that requires a response will be acknowledged within 5 business days. If no contact information has been provided, an acknowledgment will be given to the customer as soon as possible.	• 5 days

Develop CX-Related Service Level Agreements & Standards

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Considerations and Risks	Service Level Agreements and Standards will need to be developed for all key service operations and offerings provide by the County. Once developed these will need to be revisited and finalized among the department and overall County leadership. Norfolk will need to facilitate a "Roadshow" to share-out and inform the new CX-Related Service Level Agreements & Standards to all employees. Key Service Level Agreements & Standards recommended to be completed include the following. **Internal SLA's** • Individual SLAs between each department that interacts directly with customers and ServiceNorfolk. • Complaints and escalation activities • Roles & responsibilities for inputting collected customer information into salesforce CRM. • Communications protocols between departments. • Response and reply processes between departments for both internal collaboration and when responses are required to external customers. **External SLA's** • External meeting requests • Public consultants and townhalls procedure • General commitments to customer experience / service that will be adhered. • Information required to be captured from customers at every interaction. • Accessibility, Diversity, Equity, and Inclusion Practices. • Standards for communications. • Standards for completing collaboration activities (responses and replies). The development of a centralized knowledge database in SharePoint for housing these SLA's will be critical to the success of them being implemented and utilized across the organization.
Value / Benefit	• **Established Service Level Agreements**: Customer Service Policy, standards, levels, EDI, and Accessibility expectations are extended to internal employees. • **Manage Customer Expectations**: Norfolk will be able to manage customer expectations for specific tasks or activities and increase accountability. • **Improved Efficiencies**: Decrease amount of time / effort spent on addressing customer inquiries. • **Service Transparency**: The Customer Service Policy provides transparency of acceptable customer service levels and actions. • **Equitable Customer Experience:** Customers and Employees are treated with same level of equity defined by the Customer Service Policy.

Develop CX Measurement Framework

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	Define a Customer Service Performance Measurement Framework aligned to Corporate KPIs (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. Frequency of Reporting: it is recommended that the County implement an annual CX report, and a mid-year "memo" based on these metrics and share to the organization. The goal is to provide the organization with trends, score and information CX successes / challenges and customer service activities. The workshop / share-out session of the reports will be used to discuss and align on key takeaways for improvements moving forward.
Rationale	The County does not have a CX measurement framework in place to identify and track service-related metrics on a continual basis. There is also no formal approach for how the County will capture, analyze and report on these metrics to the organization. This current challenge makes it very difficult for the County to address any ongoing service issues or to make data-driven decision on how service experiences can be improved to meet customer expectations.
Details	Key Performance Indicators are essential to support the County to provide value-added services to residents. The recommended Performance Measurement Framework consists of four (4) categories. Within each category, the top KPIs have been identified. These KPIs are intended to demonstrate that the County is adequately meeting the needs of residents and clients. For each KPI, a baseline for acceptable performance needs to be established. This could include response times or percentage of satisfied respondents. The KPIs outlined within this report should be tracked at both the organizational and individual departmental level. **Norfolk County KPI Framework**

Develop CX Measurement Framework

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details

Category	Definition	Top Prioritized KPIs
Strategic CX Priorities	KPIs measure Leadership and Council actions at the organizational level related to long-term strategic goals and planning.	1. Overall Customer Satisfaction Score (CSAT) 2. Overall Likelihood to Recommend Score (NPS) 3. Overall Customer Effort Score (CES) 4. Yearly Customer Experience training delivered to organization. 5. Development and sharing of Customer Experience policies and procedures.
Customer Service	KPIs measure external interactions and customer related activities and sentiment.	1. Number of "Inquiry or Complaint" Emails Received from Customers 2. Number of "Inquiry or Complaint" Phone Calls Received from Customers 3. Number of "Inquiry or Complaint" Phone Calls / Emails Resolved within Standards (SLA's) 4. Number of Phone Calls completed by First Contact Resolution Rate 5. Average Handle time of calls
Public Engagement	KPIs measure customer involvement with the County and related activities and sentiment.	1. Number of Website Views by Customers 2. Number of Active Social Media Customers 3. Number of Social Media Responses / Replies to Customer Posts 4. Number of Formal PR / Media Releases Provided 5. Number of mentions/stories covered in media
Operational Effectiveness	KPIs measure internal operations and employee related activities, sentiment, and outputs.	1. Number of transfers across departments 2. Number of Online / Self-Serve Tasks Performed by Customers 3. Costs per interaction (broken down by individual channels and transaction type)

Develop CX Measurement Framework

Norfolk COUNTY

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details	**Implement Tracking Mechanisms:**
	The County currently has the capability to track most of the recommended KPIs. However, this is generally being done manually through digital tools that are not integrated. There is no formal governance structure for capturing, analyzing, and reporting on data.

As the County looks to activate the KPI recommendations through technology and process enhancements, it should do so by assessing two main approaches:

1. **IT Driven Approach:** The County should utilize CRM software (Salesforce), VOIP phone systems or other suitable tools to track and monitor performance metrics in real-time. In addition, Norfolk should configure dashboards and reports to visualize KPIs and trends, allowing for easy monitoring and analysis. It is important that the County ensures data accuracy and consistency by implementing standardized data entry and validation processes.
2. **Employee Driven Approach:** Allocate staff resources to continue the more predominantly manual capture / tracking of KPI's in separate systems that are already available (Bang The Table, Salesforce). Some digital / automated data capture will be viable within single systems. However, the lack of IT integration across systems will still require manual effort / staff resources to track and report on KPIs.

For both approaches, the County will need to ensure the correct process and governance is in place to support the design, collection, analysis, and reporting of KPIs. Below outlines the recommended process flow for the CX Measurement Framework.

- Salesforce Data
- Other Systems Data
- Feedback Surveys
- Informal feedback (captured when onsite / in-field).
- Google Analytics
- Voice Sentiment

Capture Data → **Analyze Data** → **Develop Report / Measure KPI** → **Share-out to Organization**

| Across all Data Capture Channels | Tools in Salesforce Tools in Office 365 (i.e., PowerBI) | Annual Report June/July Memo / Check-In | Annual Townhall |

Considerations and Risks	The County must weigh the costs and prioritization of upgrading technology solutions that support automated KPI tracking with the balance of allocating additional resources to support manual data capture.
Value / Benefit	• Appropriately identify and plan for operational improvements to meet Council and Community expectations. • Align metrics with Customer Experience Vision / Goals (when defined) to have a way of measuring performance and progress.

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.
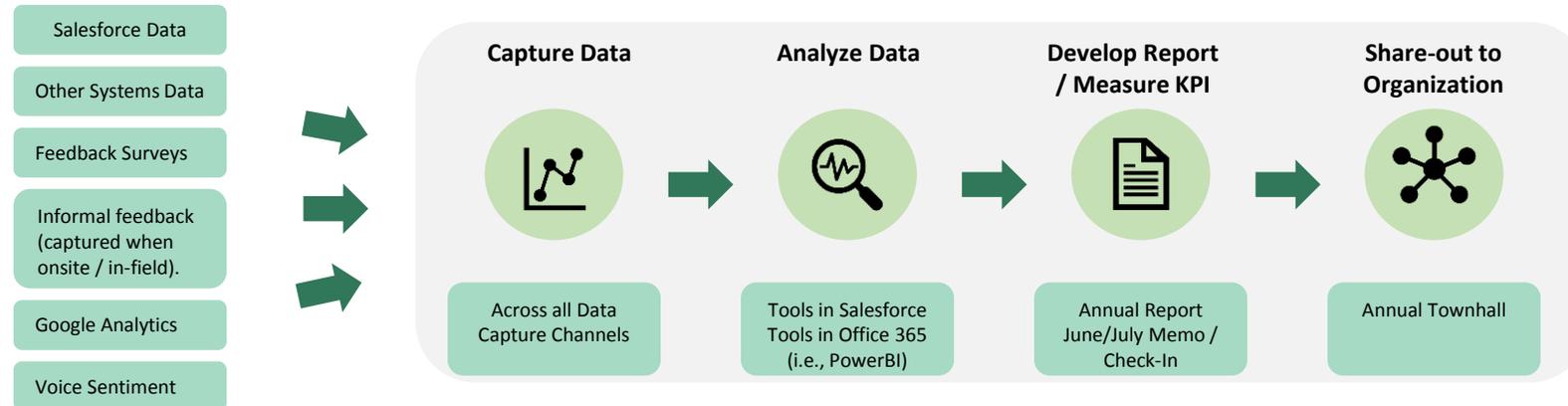
Prioritized Recommendation	Fully utilize the current Salesforce CRM system by ensuring consistent and standardized usage with enhanced integration. Assess future opportunities to leverage the CRM across all departments that interact with customers to streamline processes and improve efficiency across departments.
Rationale	Currently the Salesforce CRM is being used inconsistently by employees. The CRM is being leveraged by a few teams – there is an opportunity to expand the functionality across multiple departments to track interactions. In addition, there are opportunities to expand CRM functionality and build reporting and analytics to support CX measurement.
Details	The County must conduct the following key elements to enhance the CRM sophistication and functionality. **Integrating CRM Salesforce into other Departments:** There is an opportunity for the County to expand the CRM to be used by other departments to ensure that cross-departmental teams can manage customer complaints and inquiries in one system. Opportunities include: Assessing departmental needs and requirements to determine how the CRM software can best support their operations. • Integrating the CRM to additional Departments and Divisions across the Corporation who manage work order requests and customer tracking. • Offloading the Pearl system in favour of CRM. **Expanding CRM Functionality:** Norfolk should look at expanding current CRM functionality by assessing the following: • Creating recurring / scheduled work orders for preventative maintenance activities e.g. arena maintenance. Currently this process is paper-based. • Creating a payment processing function in Salesforce by integrating Moneris payment. Currently there isn't an online payment function available for customers. • Integrating CRM Salesforce into the new Rogers telephony system. Create the ability for the CRM system to automatically locate customer records that exist in the system when they call in to support employees with relevant customer information. Currently the 8x8 phone system is not able to integrate seamlessly with the CRM. • Integrating the CRM with the future asset management systems. • Continuing to work with MuniPaaS partner to implement CRM capabilities for Community Development to track leads, understand business trends and utilize enhanced scheduling capabilities • Integrating web-based feedback and service request forms (from website) directly into CRM for initial submission and to track ongoing communications / replies with customers. Promote this web-based channel as the primary mode of contact into ServiceNorfolk while removing dependency on various email inboxes. This will eliminate the duplication of emails and lack of standardization of some email communications being tracked in CRM and some not. **Implementing Reporting and Analytics:** Norfolk should streamline reporting and analytics capabilities in line with the metrics outlined in the CX Measurement Framework by creating the following: • Tailored reporting metrics and dashboards to track KPIs. • Recurring reports to understand key metrics, customer touchpoints, and payments to minimize manual efforts. • Investing in Salesforce Maps Module to capture and visualize customer data to understand trends and predict requests and services.

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Details	**Establishing and Documenting Standardized Processes** Processes should be standardized, documented, and shared with all departments leveraging CRM Salesforce. Norfolk should create the following: • Roles and responsibilities between departments (e.g. who is responsible for inputting information, updating, and closing workflow orders in CRM). • Procedures for creating, updating, handing-off, and closing workflow orders. • Process maps that document visually displays flow of work. • Guides and tools for employees to leverage. **Facilitating Comprehensive Training and Support:** The County should ensure CRM processes are understood and standardized by incorporating CRM training. Specifically, the County should focus on the following: • Communicating the benefits of CRM usage to staff, emphasizing its role in streamlining processes and enhancing customer service. • Providing concrete examples of how CRM software can simplify tasks and improve outcomes for staff members. • Developing a tailored training program to address staff concerns and build proficiency in CRM usage. • Offering hands-on training sessions, workshops, and ongoing support to ensure staff are comfortable with the software. • Ensuring that third party contractors who utilize the CRM such as Norfolk Disposal and Hastings Utilities receive training and onboarding of the CRM expansion. **Recruiting CX Coordinator Position:** To ensure a seamless expansion of the CRM, there is an opportunity for the County to hire a dedicated Customer Experience (CX) coordinator position who can oversee the following activities specifically related to the CRM enhancements: • Establishing a dedicated full-time position for the salesforce system to oversee the continued updating, rollout, training, data capture / reporting from the system. • Serving as the point of contact for CRM-related queries and ensuring the system is optimized for how it is being used across the County. • *Further description into the role and responsibilities of the Customer Experience (CX) Coordinator can be found in the appendix.*
Considerations and Risks	Norfolk should consider the use and functionality of the CRM across different departments. Individual department needs should be considered as the CRM is being integrated into other departments. Norfolk will also need to assess the financial implications of expanding the CRM.
Value / Benefit	• **Streamlined Processes:** CRM software becomes seamlessly integrated into daily workflows, streamlining processes and reducing manual effort. • **Increased Capabilities:** Increase functionality to perform Customer Relationship Management (CRM) capabilities to track customer interactions and service-related information. • **Metrics Tracking:** Aligned data capture with the recommended customer feedback and operational metrics. • **Ongoing CRM Support:** The dedicated CRM management position ensures ongoing support, training, and optimization of the software, leading to continuous improvements in operations and service delivery. • **Consistent CRM Processes**: Processes are standardized and consistent across the organization.

Enhance After Hours / 311 Service Capabilities

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Prioritized Recommendation	Enhance how Norfolk County delivers "After Hours" related services to customers through building on current partnerships with third party (bearcom) call centre operations.
Rationale	Customers have very limited access / ability access to interact with Norfolk County after regular business hours. The level and types of services able to be completed are minimal causing service reps to have increased amounts of voicemail / email messages waiting in the mornings that must be actioned.
Details	Enhancements to this operation include the following key capabilities.: **1.Stakeholder Engagement and Buy-In:** • The County must engage key stakeholders, including county officials, department heads, and community leaders, to build awareness of the after hours / 311-phone number. This will increase utilization rates and ensure the investment is worth the increase to customer service experience from customers. **2.Vendor Selection and Contract Negotiation:** • The county must assess and evaluate existing / new potential vendors that meet the required criteria outlined in the CX Strategy. • It is very important that the County partners with an organization that has the resources available that can learn the required activities / task to be completed and meet the volume demands at the defined service levels. **3. Infrastructure and Technology Setup:** • The County must show they are able to integrate third party telephony system into salesforce including any phone lines and call center software. This is a critical aspect to the success of the enhancements. The purpose of the centralized service model is to have a single place for housing customer interaction data / insights. Therefore, after hours contacts must be tracked and managed within salesforce. **4.Staff Training and Capacity Building:** • The County must provide comprehensive training for call center staff who will be responsible for handling inquiries and requests received through the after hours / 311-phone number. • Key capabilities of the reps includes customer service best practices, information dissemination protocols, procedures / process for completing the County's various services that will be a part of the after-hours service offerings, and the use of technology tools (i.e., salesforce) to ensure efficient and effective service delivery.

Enhance After Hours / 311 Service Capabilities

The following details outline the prioritized recommendation. This summary is meant to support the County in implementing this opportunity.

Considerations and Risks	Norfolk will need to consider the division of roles and responsibilities for the "After Hours" function. Specifically including the following. • What tasks will the third-party be responsible for completing? • What knowledge / information about Norfolk County will the after-hours operations be required to know. • What access to sales force will the after-hours service reps have in order to track customer interactions in the system?
Value / Benefit	• Residents and stakeholders benefit from an easily accessible point of contact for government services and information through the interaction channels outside of the normal 9-5 workday interacting during work hours is not always possible for citizens and therefore require a way to ask questions and get issues resolved when is convenient to them. • The implementation of enhanced after hours services fosters greater citizen engagement and participation in local government by providing a convenient and efficient channel for communication and feedback. • Norfolk County achieves greater efficiency in service delivery processes, resulting in faster response times, reduced call handling times, and improved overall service quality. Customer issues / inquiries will be handled at the point of contact and not be waiting in voicemail / email inboxes in the morning for ServiceNorfolk reps.

Action Plan

Overview of Implementation Governance and Roadmap

The following section focuses on the timeline and governance, costs, and timelines to implement the recommendations for CX improvement initiatives. This section has three components that include: Implementation Overview, Roadmap, and Governance.

The Implementation Governance outlines the recommended Governance Structure for the implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When"), and resources required (Cost / Effort). Resource requirements are broken down into either "In-House", where Norfolk can complete within the organization and "Vendor Supported" where Norfolk will need to look externally for subject matter expertise and support.

Ranges for resource requirement include the below estimated costs ($'s) and effort (days). Effort refers to the total amount of actual work effort that would be required from Norfolk employees to complete the complete the implementation of defined recommendations.

Cost ($)
- $1,000 - $25,000
- $25,000 - $50,000
- $50,000 - $75,000
- $75,000 - $100,000
- $100,000+

Effort (total days)
- 1-5 days
- 5-10days
- 10-20days
- 20-30days
- 30+ days

The Implementation Roadmap showcases a high-level overview of the Implementation Approach for each recommendation identified throughout this initiative. Each recommendation is identified as short-term, medium-term or long-term. The actual timelines to implement will be dependent on the capacity and priority of Norfolk resources. The purpose of the Implementation Roadmap is to provide a cadence and order of operations that Norfolk can follow to successfully implement the recommendations and ensure a foundation is built in which to execute subsequent implement initiatives.

Summary of Recommendations

The Action Plan looks to support Norfolk County in the planning , implementation and execution of the identified recommendations. The complete list of identified recommendations can be found below.

People

ID		Recommendation
1		Design and Deliver Mandatory Service-Related Training to the Organization
2		Enhance Employee Engagement and Recognition Program
3		Develop a Continuous Customer Feedback Gathering Program
4		Define a Customer Issue, Inquiry and Escalation Policy / Procedure
5		Develop Internal Employee Service Level Agreements & Standards
6		Perform Recurring Succession Planning & Resourcing Assessments
7		Facilitate a "Roadshow" to share-out and present the newly designed CX Strategy
8		Create a CX-Champion Program Across the Organization

Process

ID		Recommendation
9		Enhance Centralized Customer Service Function for ServiceNorfolk
10		Develop CX-Related Service Level Agreements & Standards (Internal & External)
11		Develop a CX Measurement Framework
12		Develop and Implement a Harassment Policy
13		Develop Standardized Procedures & Templates for Interacting with Customers Across Key Activities

Technology

ID		Recommendation
14		Enhance CRM Sophistication and Functionality
15		Enhance After Hours / 311 Service Capabilities
16		Conduct a Technology Review / Assessment of Current IT Infrastructure
17		Modify Approach to Capturing Service-Related Operational Data & Metrics
18		Increase Customer Self-Serve Capabilities through Online / Digital Channels
19		Update Website Structure for Effective Delivery of Key Updates to Customers

Prioritized Recommendations that **are targeted as foundational and provided comprehensive detail in the following section into what is included in the improvement opportunity.**

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required

1	Design and Deliver Mandatory Service-Related Training to the Organization	**Project Owner and Delivery Support**
		• Human Resources
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
		• Departments - Input required to identify role-specific learning paths and upskill needs.
			1. Leverage the recommendations within the CX Strategy to identify a list of training needs and learner profiles as an initial step.
			2. Develop comprehensive training modules covering topics such as customer service principles, communication skills, conflict resolution, and service recovery through the third-party vendor.
			3. Determine the most effective delivery methods, such as workshops, seminars, online courses, or blended learning approaches.
			4. Develop a training schedule that accommodates the availability and preferences of employees while ensuring minimal disruption to operations.
			5. Collect feedback from participants to assess the effectiveness of training sessions. Use evaluation data to refine and improve future training programs.
				Medium-Term	**In-House Delivery:**
					• Skills Required:
					  • Instructional Design and Training Facilitation Skills
					• Effort Required:
					  • 20-30 days
					
					Vendor Delivery:
					• Cost Required:
					  • $25,000-$50,000 (Customized Instructor-Led Training)
					  • $1,000 - $25,000 (off-the shelf CX Module).

2	Enhance Employee Engagement and Recognition Program	**Project Owner and Delivery Support**
		• Human Resources
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Define the objectives, scope, and criteria of the recognition program.
			2. Coordinate with HR to confirm and align on how the Talent Management Strategy will impact and/or how the recognition program (for CX) will incorporate into this.
			3. Develop a framework for different types of recognition (e.g., peer-to-peer, manager-led, formal awards) and criteria like importance of recognition, the criteria for nomination, and the impact it can have on morale and productivity
			4. Establish clear guidelines and nomination processes for recognizing employees and metrics to measure the success of the recognition program, such as employee satisfaction scores, retention rates, and productivity levels.
			5. Create a communication plan to raise awareness about the new recognition program and Use multiple channels (e.g., email, intranet, meetings) to inform employees about the program, its purpose, and how they can participate.
			6. Launch the recognition program with a kick-off event or announcement to generate enthusiasm and participation.
				Short term-Medium term	**In-House Delivery:**
					• Skills Required:
					  • Employee Motivation and Recognition Program Design
					• Effort Required:
					  • 10-20 days
					
					Vendor Delivery:
					• Cost Required:
					  • N/A (vendor support not required / recommended)

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required
3	Develop a Continuous Customer Feedback Gathering Program	**Project Owner and Delivery Support** • Corporate Communications & Customer Service • Accessibility & Special Projects. • Departments - Input required to confirm desired feedback to be captured.	1. Determine the frequency and methods of data collection, including surveys, feedback forms, interviews, and social media monitoring. 2. Identify the most appropriate channels for gathering customer feedback based on the target audience 3. Train frontline staff to proactively solicit feedback from customers during interactions and to document feedback effectively. 4. Establish a process for collecting and analyzing feedback data in real-time or on a regular basis. 5. Categorize feedback into different themes or topics to prioritize areas for improvement.	Medium Term	**In-House Delivery:** • Skills Required: • Survey Design • Survey Platform Programming • Effort Required: • 10-20 days **Vendor Delivery:** • Cost Required: N/A – leverage existing / free survey licenses
4	Define a Customer Issue, Inquiry and Escalation Policy / Procedure	**Project Owner and Delivery Support** • Corporate Communications & Customer Service • Accessibility & Special Projects.	1. Leverage the developed complaint escalation process defined within CX Strategy. 2. Incorporate additional detail related to formalizing a clear and consistent framework that outlines the processes / steps, handoff protocols, escalations and close-offs. 3. Create and share formal documented Support Material for the process. 4. Integrate Issue / Complaint Process into CX Training program	Short term – medium term	**In-House Delivery:** • Skills Required: • Process Mapping • Procedure Design • Effort Required: • 5-10 days **Vendor Delivery:** • Cost Required: N/A
5	Develop Internal Employee Service Level Agreements & Standards (departmental and Cross-Functional)	**Project Owner and Delivery Support** • Corporate Communications & Customer Service • Accessibility & Special Projects. • Departments - Input required to confirm service levels within departments and realistic SLA's when collaborating with ServiceNorfolk.	1. Determine specific expectations for employee communication, processes, activities and collaboration (internally and with external customers). 2. Collaborate with departments to document specific service level agreements for the departments and for departments coordinating with ServiceNorfolk. 3. Define clear metrics to measure employee performance against the established standards / agreements. 4. Socialize the Service Level Standards across the organization.	Short term – medium term	**In-House Delivery:** • Skills Required: • Procedure Design • Workshop / interview facilitation • Effort Required: • 5-10 days **Vendor Delivery:** • Cost Required: N/A

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required

6	Perform Recurring Succession Planning and Resourcing Assessments	**Project Owner and Delivery Support**
		• Human Resources
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Analyze workforce demographics, turnover rates, skills gaps, and anticipated changes in workload to inform resourcing decisions of ServiceNorfolk.
			2. Monitor and analyze trends in customer interactions, such as call volumes and in-person visits, to align resourcing needs with changes in customer demand.
			3. Identify patterns and fluctuations in customer interactions to anticipate staffing requirements for the customer experience team.
			4. Conduct a gap analysis to identify any discrepancies between current staffing levels and projected resourcing needs.
			5. Identify any skill gaps and develop strategies for upskilling existing staff or recruiting new talent to ensure the team is equipped to handle evolving customer needs.
				Long Term	**In-House Delivery:**
					• Skills Required:
					  • Data Analysis
					  • Team Resourcing & Skill Development
					• Effort Required:
					  • 1-5 days (annually)
					
					Vendor Delivery:
					• Cost Required: N/A

7	Facilitate a "Roadshow" to share-out and present the newly designed CX Strategy	**Project Owner and Delivery Support**
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Develop a detailed plan for the roadshow, including the schedule, locations, agenda, and presentation content.
			2. Identify key stakeholders and target audience members who should attend the roadshow sessions.
			3. Ensure that all necessary equipment and materials, such as presentation slides, handouts, and promotional items, are prepared and ready for each session.
			4. Facilitate interactive and engaging roadshow sessions to effectively communicate the CX Strategy to the audience.
			5. Collect feedback from attendees after each roadshow session to evaluate the effectiveness of the presentations and gather insights for improvement.
				Short Term	**In-House Delivery:**
					• Skills Required:
					  • Workshop / Presentation Facilitation Skills
					• Effort Required:
					  • 1-5 days
					
					Vendor Delivery:
					• Cost Required: N/A

8	Create a CX-Champion Program Across the Organization	**Project Owner and Delivery Support**
		• Human Resources
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Collaborate with department heads and managers to identify enthusiastic employees in each department who demonstrate a strong commitment to customer experience (CX).
			2. Provide training and onboarding sessions for CX champions to familiarize them with the organization's CX strategy, goals, and initiatives.
			3. Schedule recurring meetings for CX champions across the organization
			4. Solicit feedback from CX champions on a regular basis to gather insights, suggestions, and feedback on the organization's CX strategy and initiatives.
			5. Use this feedback to refine and improve the CX-Champion Program and to address any challenges or barriers to success.
				Medium Term	**In-House Delivery:**
					• Skills Required:
					  • Committee Design
					  • Workshop / Presentation Facilitation Skills
					• Effort Required:
					  • 5-10 days
					
					Vendor Delivery:
					• Cost Required: N/A

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required

9	Enhance Centralized Customer Service Function for ServiceNorfolk	**Project Owner and Delivery Support**
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects
		• IT team to ensure that centralized ServiceNorfolk team is setup with appropriate IT tools systems
			1. Leverage recommended new design of ServiceNorfolk within the CX Strategy.
			2. Develop comprehensive support materials for Customer Service Representatives (CSRs) to facilitate the delivery of the modified centralized customer service.
			3. Enhance guides, manuals, and FAQs covering common customer inquiries, troubleshooting steps, and service protocols.
			4. Refresh customer service reps' skills and knowledge for cross-skilling across all channels of customer interactions.
				Short Term – Medium Term	**In-House Delivery:**
					• Skills Required:
					  • Organizational Structure Design
					  • Resource Allocation
					• Effort Required:
					  • 5-10 days
					
					Vendor Delivery:
					• Cost Required: N/A

10	Develop CX-Related Service Level Agreements & Standards	**Project Owner and Delivery Support**
		• Corporate Communications & Customer Service
		• Accessibility and Special Projects
		• Scope includes assessment, creating support materials and roll-out.
			1. Identify key touchpoints in the customer journey and establish standards for each touchpoint, focusing on aspects such as responsiveness, empathy, and problem resolution
			2. Develop support materials to explain and exemplify the customer experience level standards.
			3. Utilize various communication channels, such as company-wide emails, intranet announcements, and team meetings, to introduce and reinforce the standards.
			4. Use surveys, metrics, and customer feedback to assess performance against the standards and identify areas for improvement.
				Medium Term – Long Term	**In-House Delivery:**
					• Skills Required:
					  • Standards Design
					  • Communications
					• Effort Required:
					  • 10-20 days
					
					Vendor Delivery:
					• Cost Required: N/A

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required
11	Develop CX Measurement Framework	**Project Owner and Delivery Support** • Corporate Communications & Customer Service • Accessibility & Special Projects	1. Leverage CX Measurement Framework developed within the CX Strategy. 2. Identify and align the Customer Experience (CX) KPIs with the overarching corporate objectives and KPIs of the organization. 3. Define a set of customer feedback and operational metrics that accurately measure the performance of key aspects of the customer experience. 4. Establish a governance framework to oversee the implementation and management of the CX measurement framework. 5. Define roles, responsibilities, and decision-making processes for stakeholders involved in data collection, analysis, and reporting.	Medium Term – Long Term	**In-House Delivery:** • Skills Required: • Performance Measurement • Effort Required: • 5-10 days **Vendor Delivery:** • Cost Required: N/A
12	Develop and Implement a Harassment Policy	**Project Owner and Delivery Support** • Human Resources • Corporate Communications & Customer Service • Accessibility & Special Projects	1. Coordinate with HR to confirm and align on how the Talent Management Strategy will impact and/or how the Harassment Policy (for CX) will incorporate into this new plan. 2. Leverage recommendation found within the CX Strategy to further define prohibited behaviors, including sexual harassment, discrimination, bullying, and retaliation, and establish clear reporting procedures. 3. Communicate the anti-harassment policy to all employees through multiple channels, including employee handbooks, company intranet, and mandatory training sessions. 4. Ensure that employees understand their rights and responsibilities under the policy and know how to report incidents of harassment. 5. Establish clear procedures for reporting incidents of harassment, including multiple reporting channels and options for anonymous reporting	Short Term – Medium Term	**In-House Delivery:** • Skills Required: • Harassment Subject Expertise • Policy Design • Effort Required: • 10-20 days **Vendor Delivery:** • Cost Required: N/A
13	Develop Standardized Procedures and Templates for Interacting with Customers Across Key Activities	**Project Owner and Delivery Support** • Corporate Communications & Customer Service • Accessibility & Special Projects • Departments - Input required to identify key customer activities.	1. Identify areas where standardization of procedures and templates can improve consistency and efficiency in customer interactions. 2. Create templates for various customer communication channels, including emails, phone scripts, chat messages, and in-person interactions. 3. Integrate standardized procedures and templates with existing customer relationship management (CRM) systems, helpdesk software, and communication platforms 4. Provide training and onboarding sessions for employees on the standardized procedures and templates.	Short Term – Medium Term	**In-House Delivery:** • Skills Required: • Process Design • Procedure Design • Effort Required: • 10-20 days **Vendor Delivery:** • Cost Required: N/A

Implementation Governance

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required

14	Enhance CRM Sophistication and Functionality	**Project Owner and Delivery Support**
		• ERP Coordinators and IT department
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Leverage recommendation of functionality enhancements within the CX Strategy to prioritize identified gaps and implement updates into Salesforce.
			2. Implement internal enhancements to support employees with more effective information capture / tracking and streamlined internal processes.
			3. Implement integration with other systems to ensure that all appropriate information is being tracked within salesforce.
			4. Add CX Coordinator position to manage the functionality updates and general maintenance of the system. Ensure CX Coordinator understands research and data capture to own the collection and reporting of the recommended CX Measurement Framework.
				Medium Term – Long Term	**In-House Delivery:**
					• Skills Required:
					   • IT Requirements Gathering
					   • Salesforce Functionality
					• Effort Required:
					   • 10-20 days
					• Cost Required: $50,000-$75,000 (annual salary for CX Coordinator)
					
					Vendor Delivery:
					• Cost Required: N/A

15	Enhance After Hours / 311 Service Capabilities	**Project Owner and Delivery Support**
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Research and evaluate vendors that offer After Hours / 311 related phone number solutions, considering factors such as reliability, scalability, features, and cost. Can leverage relationship with bearcom to identify the possible additions to their roles and responsibilities with answering more general inquiries from customers.
			2. Identify the roles and responsibilities required form the after hour / 311 service (i.e., what activities do you want these Reps to complete?).
			3. Integrate the after hours / 311-phone number with Salesforce. Ensure that the 311 Reps have access and are skilled on using Norfolk's Salesforce CRM system. It is critical that information be tracked effectively in this system.
				Medium Term – Long Term	**In-House Delivery:**
					• Skills Required:
					   • IT Requirements Gathering
					• Effort Required:
					   • 5-10 days
					
					Vendor Delivery:
					• Cost Required: $25,000-$50,000 (annually)

16	Conduct a Technology Review / Assessment of Current IT Infrastructure	**Project Owner and Delivery Support**
		• ERP Coordinators and IT department
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Collaborate with department heads and end-users to gather requirements for current software solutions being used across different departments.
			2. Compile an inventory of all software solutions currently in use across the organization, including applications, platforms, and cloud services.
			3. Document key details for each solution, such as vendor, version, license type, and metrics.
			4. Develop recommendations for optimizing the organization's software landscape, including potential consolidation, replacement, or integration of existing solutions.
			5. Confirm the capabilities of the systems to automate high-volume tasks and integrate into Salesforce CRM. Ensure that there are no duplicate functionalities the CRM completes.
				Short Term	**In-House Delivery:**
					• Skills Required:
					   • IT Requirements Gathering
					   • Systems Knowledge
					• Effort Required:
					   • 10-20 days
					
					Vendor Delivery:
					• Cost Required: N/A

The following tables outlines the recommended Governance Structure for the Implementation of Recommendations. The Governance Structure details key elements of the Roadmap including the employees involved ("Who"), the steps / activities required ("How"), and the timeline for being completed ("When").

ID	Recommendation	Who Owners, roles, and responsibilities	How Key steps and actions needed to be undertaken to implement recommendation	Timeline	Resources Required

17	Modify Approach to Capturing Service-Related Operational Data and Metrics	**Project Owner and Delivery Support**
		• ERP Coordinators and IT
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
		• Finance
			1. Determine which metrics align with organizational goals and objectives, as well as those that directly impact service delivery.
			2. Evaluate and update the methods used to capture operational data and metrics to ensure accuracy, consistency, and relevance
			3. Leverage findings from Conduct a Technology Review / Assessment of Current IT Infrastructure to assess the organization's existing data systems and technologies to determine their capability to capture and analyze service-related operational data.
			4. Provide training to staff members involved in data collection and reporting.
				Short Term – Medium Term	**In-House Delivery:**
					• Skills Required:
					  • Systems data tracking and analyses
					• Effort Required:
					  • 5-10 days
					
					Vendor Delivery:
					• Cost Required: N/A

18	Increase Customer Self-Serve Capabilities through Online / Digital Channels	**Project Owner and Delivery Support**
		• ERP Coordinators and IT department
		• Corporate Communications & Customer Service
		• Accessibility & Special Projects.
			1. Identify key services and functions that are suitable for self-serve capabilities through online channels.
			2. Prioritize functions based on their feasibility, impact, and importance to customers.
			3. Target e-permitting, payments, and program scheduling/booking as the initial focus areas for self-serve capabilities.
			4. Evaluate existing technology infrastructure and platforms to determine their suitability for enabling self-serve capabilities.
			5. Identify any gaps or requirements for additional software, systems, or integrations to support online self-service functionalities
			6. Provide training and support resources for customers to learn how to use the online self-service platforms effectively.
				Long Term	**In-House Delivery:**
					• Skills Required:
					  • Systems data tracing and analyses
					• Effort Required:
					  • 20-30 days
					
					Vendor Delivery:
					• Cost Required: $1,000-$25,000 (upgrades to website / portal functionality)

19	Update Website Structure for Effective Delivery of Key Updates to Customers	**Project Owner and Delivery Support**
		• Corporate Communications
		• Scope includes identification, updating and copyrighting.
			1. Analyze customer service data to identify the most common types of inquiries and requests received by the County.
			2. Prioritize sections of the website based on the volume of interactions, focusing on areas that consistently generate high traffic.
			3. Revise the website navigation to prominently feature sections dedicated to addressing high-volume interactions.
			4. Ensure that these sections are easily accessible from the homepage and clearly labeled for quick identification by visitors.
			5. Create dedicated sections on the website for specific types of inquiries, such as payments, permits, and service requests.
			6. Ensure that all service activities and interactions within the website can be tracked and captured within Salesforce CRM.
				Short Term	**In-House Delivery:**
					• Skills Required:
					  • Website Design
					  • Salesforce Integrations
					• Effort Required:
					  • 10-20 days
					
					Vendor Delivery:
					• Cost Required: N/A

Implementation Roadmap

The following chart outlines the recommended Implementation Overview of Recommendations broken Short, Medium, and Long Term.

ID	Recommendation	Short Term	Medium Term	Long Term
1	Design and Deliver Mandatory Service-Related Training		Process	Process
2	Enhance Employee Engagement and Recognition	Process	Process	
3	Develop Customer Feedback Gathering Program	Process	Process	
4	Define Customer Issue/Inquiry/Escalation Procedure	Process		
5	Develop Internal Employee SLAs			
6	Succession Planning and Resourcing Assessments		Process	Process
7	Facilitate a "Roadshow" of the CX Strategy	Process		
8	Create a CX-Champion Program		Process	
9	Enhance Centralized Customer Service Function	People	People	
10	Develop CX-Related Service Level Agreements & Standards.		People	
11	Develop CX Measurement Framework		People	Process
12	Develop and Implement a Harassment Policy	People	People	
13	Develop Standardized Procedures and Templates	People		
14	Enhance CRM Sophistication and Functionality	People	People	
15	Enhance After Hours / 311 Service Capabilities		People	People
16	Conduct a Technology Review / Assessment			People
17	Capture Service-Related Data and Metrics	People	People	
18	Increase Customer Self-Serve Capabilities			People
19	Update Website Structure	People		

Legend: People ▓ | Process ░ | Technology ▉

Key Considerations and Risks

The following chart outlines the considerations and risks associated to implementing recommendations.

No.	Category	Who will be affected	Risks	Key Considerations	Mitigation Strategy
1.	Employee experience	All employees within the organization.	1. Resistance to change from employees who may feel overwhelmed or uncertain about the impact of changes on their roles or work environment. 2. Decreased morale and productivity if changes lead to increased workload or job dissatisfaction. 3. Employee turnover or disengagement if changes are not effectively managed or communicated.	1. Ensure that changes positively impact employee morale, productivity, and job satisfaction. 2. Provide adequate support, resources, and training to help employees adapt to new processes or initiatives. 3. Communicate openly and transparently to address any concerns or resistance among employees.	1. Conduct comprehensive training and communication programs to ensure employees understand the rationale behind changes and feel supported throughout the transition. 2. Provide opportunities for feedback and involvement in decision-making processes to empower employees and foster a sense of ownership.
2.	Change management	All employees within the organization	1. Resistance to change from employees who are accustomed to existing processes or workflows. 2. Lack of alignment between organizational goals and individual employee objectives. 3. Inadequate planning or communication leading to confusion and disruption in workflows	1. Develop a clear and comprehensive change management plan that outlines objectives, timelines, and communication strategies. 2. Identify potential barriers to change and develop strategies to address them proactively. 3. Provide ongoing support and resources to help employees navigate through transitions.	1. Establish a dedicated change management team or committee to oversee the implementation of change initiatives and address any challenges or concerns. 2. Communicate the benefits of change and provide opportunities for employees to voice their concerns or suggestions.

Key Considerations and Risks

The following chart outlines the recommended Implementation Overview of Recommendations broken Short, Medium, and Long Term.

No.	Category	Who will be affected	Risks	Key Considerations	Mitigation Strategy
3.	"Departmentalism" or continued silos	Employees within different departments, as well as customers who interact with multiple departments.	1. Resistance to collaboration or sharing of resources due to departmental rivalries or competing priorities. 2. Inefficient use of resources and duplication of efforts across departments. 3. Difficulty in maintaining consistency and coherence in customer experiences across different touchpoints.	1. Promote cross-functional collaboration and communication to break down silos. 2. Foster a culture of teamwork, shared goals, and mutual respect among departments. 3. Implement processes and tools that facilitate information sharing and collaboration across departments.	1. Implement cross-functional teams or committees to address specific issues or projects that require collaboration across departments. 2. Establish clear communication channels and protocols for sharing information and coordinating activities between departments. 3. Provide training and development opportunities to foster a culture of collaboration and teamwork.
4.	Financial implications	Finance department, senior management (SLT), and stakeholders involved in budgeting and financial planning.	1. Budget constraints limiting the scope or effectiveness of initiatives. 2. Inaccurate forecasting leading to cost overruns or unexpected expenses. 3. Difficulty in quantifying the ROI of intangible benefits such as improved employee morale or customer satisfaction.	1. Conduct a thorough cost-benefit analysis to assess the financial impact of proposed changes or initiatives. 2. Allocate resources effectively to maximize return on investment and ensure sustainability. 3. Monitor financial performance metrics regularly to track expenditures and identify areas for optimization.	1. Involve finance and accounting teams in the planning and decision-making process to ensure alignment with financial objectives and constraints. 2. Implement financial controls and monitoring mechanisms to track expenditures and ensure compliance with budgetary constraints. 3. Continuously evaluate the financial performance of initiatives and adjust resource allocation as needed to optimize outcomes

Key Considerations and Risks

The following chart outlines the recommended Implementation Overview of Recommendations broken Short, Medium, and Long Term.

No.	Category	Who will be affected	Risks	Key Considerations	Mitigation Strategy
5.	Performance measures	All employees and departments within the organization responsible for achieving performance targets and objectives.	1. Inadequate measurement or tracking of performance metrics leading to inaccurate assessment of effectiveness. 2. Over-reliance on quantitative metrics without considering qualitative feedback or contextual factors. 3. Difficulty in establishing meaningful benchmarks or targets due to lack of historical data or industry standards.	1. Define clear and measurable performance metrics aligned with organizational objectives and desired outcomes. 2. Establish benchmarks and targets to track progress over time and evaluate effectiveness. 3. Regularly review and analyze performance data to identify areas for improvement and inform decision-making.	1. Ensure alignment between performance metrics and organizational goals by involving stakeholders from different departments in the development process. 2. Implement performance management systems and dashboards to track progress and communicate results transparently across the organization. 3. Provide training and support to employees to help them understand performance metrics and take ownership of their role in achieving targets.
6.	Analysis and insights	Senior management, department heads, and stakeholders responsible for strategic planning and decision-making.	1. Limited access to reliable data or insufficient analytical capabilities hindering the generation of actionable insights. 2. Ineffective communication or dissemination of insights to key stakeholders, resulting in missed opportunities for improvement. 3. Failure to adapt strategies or initiatives based on changing market conditions or emerging trends identified through analysis.	1. Leverage benchmarking data, historical trends, and best practices to inform decision-making and strategy development. 2. Conduct regular assessments and evaluations to identify opportunities for improvement and innovation. 3. Align analysis and insights with existing and future corporate initiatives to ensure relevance and impact.	1. Limited access to reliable data or insufficient analytical capabilities hindering the generation of actionable insights. 2. Ineffective communication or dissemination of insights to key stakeholders, resulting in missed opportunities for improvement. 3. Failure to adapt strategies or initiatives based on changing market conditions or emerging trends identified through analysis.

Appendix

Appendix I: Research Methods

Research Methods

Below is a list of research activities completed to extract insights for the analysis report. Our comprehensive approach utilizes a mix of sources for a deeper and holistic understanding of Norfolk County's current CS/CX landscape.

Historical Records	**Desktop Research**	**Onsite Visits**	**Interviews**	
40+ Documents	10 Municipal Counties	5 County Locations	X25 1:1's	X5 Group Workshops

Employee Survey	**Visioning Workshops**	**Customer Survey**
X1	X2	X1

Data Sources: Interviews with Norfolk County employees, including Senior Leadership, managers and frontline staff, were conducted to understand their perspective on customer interactions and areas of improvement going forward.

Data Analysis: All qualitative data collected through interviews was transcribed, coded, and analyzed to identify recurring themes and pain points. The Concept of " Thematic analysis" was used to identify commonalities in the data and provided segmentation

Research Roadmap

The project was completed in a 12-week timeline. The following representation highlights the research roadmap and subsequent weeks of development.

	Week 0	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12

Phase 1

Historical Record Analysis

Desktop Competitor Research

Onsite Research

Phase 2

Data Request

Employee 1 : 1 Interviews

Employee Group Workshops

Visioning Workshops

Phase 3

Employee Survey

Customer Survey
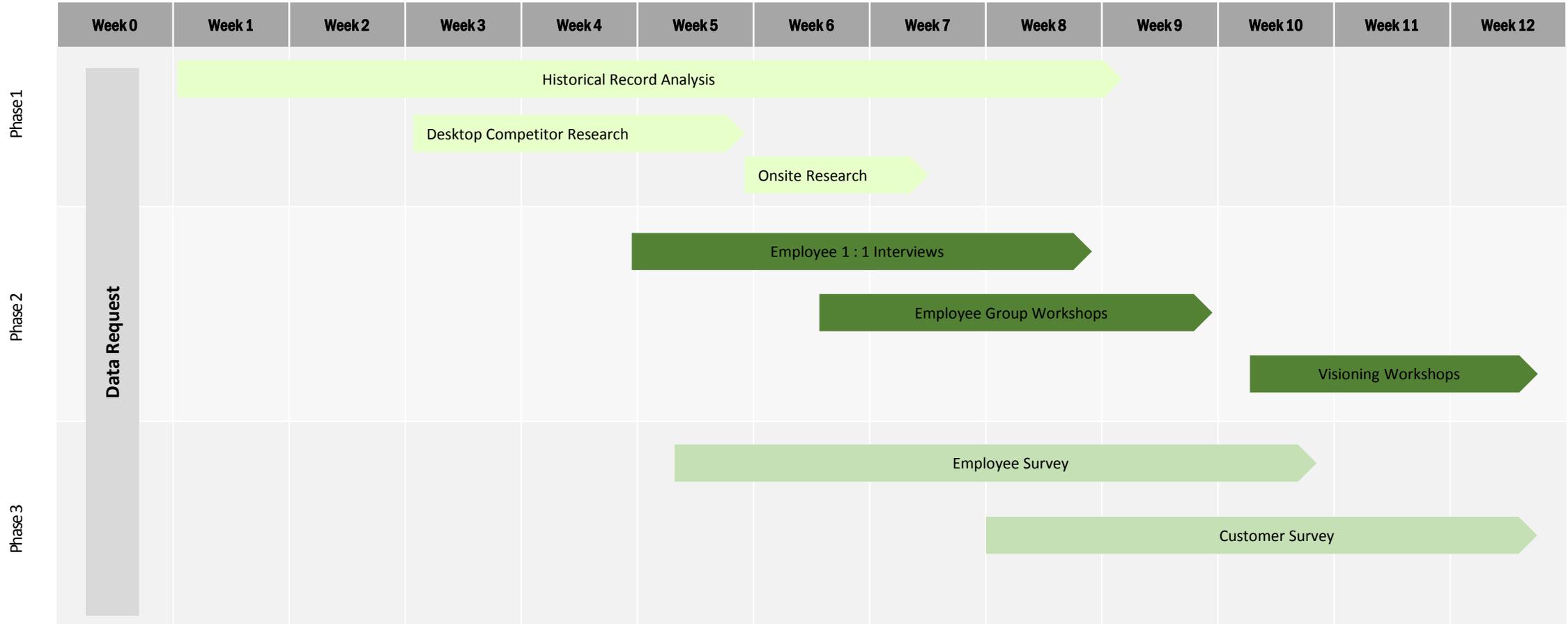
Summary of all research activities

Below is a list of research activities completed to extract insights for the analysis report. Our comprehensive approach utilizes a mix of sources for a deeper and holistic understanding of Norfolk County's current CS/CX landscape.

	Desktop Research	**Onsite**	**Employee Research**	**Customer Research**
	Historical Records and Municipal Scan	**5 County Locations**	**1: 1 and Group Interviews. Survey**	**Customer Survey**
Activity Conducted	• Over 40 historical records and documents were analysed to understand the county's current state • Norfolk County's CX/CS Landscape was compared to 5+ competitors to understand industry best practices	• Five (5) Norfolk County locations were assessed in terms of customer experience delivery • This activity was conducted to obtain direct observations to how customers interactions occur at facilities	• Twenty-Five (x25) In-depth interviews were conducted with employees in SLT and managerial roles. • Five(5) group workshops with frontline facing staff • Two(2) visioning workshops with TPT and Council. • One (1) Employee survey deployed to all county employees	• One (1) Customer survey deployed to engage Norfolk Platform
Research Parameters	Organisational charts, county policies, Channels of communication, SLA's and Metrics	Facilities Review, Job Shadowing, Technology Walkthrough	Current and Future state CX vision, Challenges, Opportunities	Current and Future state CX vision, Challenges, Opportunities

Primary Research

Data analysis and Synthesis

The below outlines the framework and steps utilized in the analysis and interpretation of the data

The thorough analysis and interpretation of data provided valuable insights that served as the foundation for the development of the Customer Experience Strategy. By translating data into actionable recommendations, Norfolk County is poised to enhance customer satisfaction and service delivery across all touchpoints.

Data Analysis

- Compilation of data from all research activities
- Thematic analysis of qualitative data
- Statistical analysis of quantitative data

Data Interpretation

- Key Insights
- Benchmarking
- Analysis of discrepancies

Data Utilization

- Informed decision making
- Development of actionable recommendations
- Continuous improvement framework
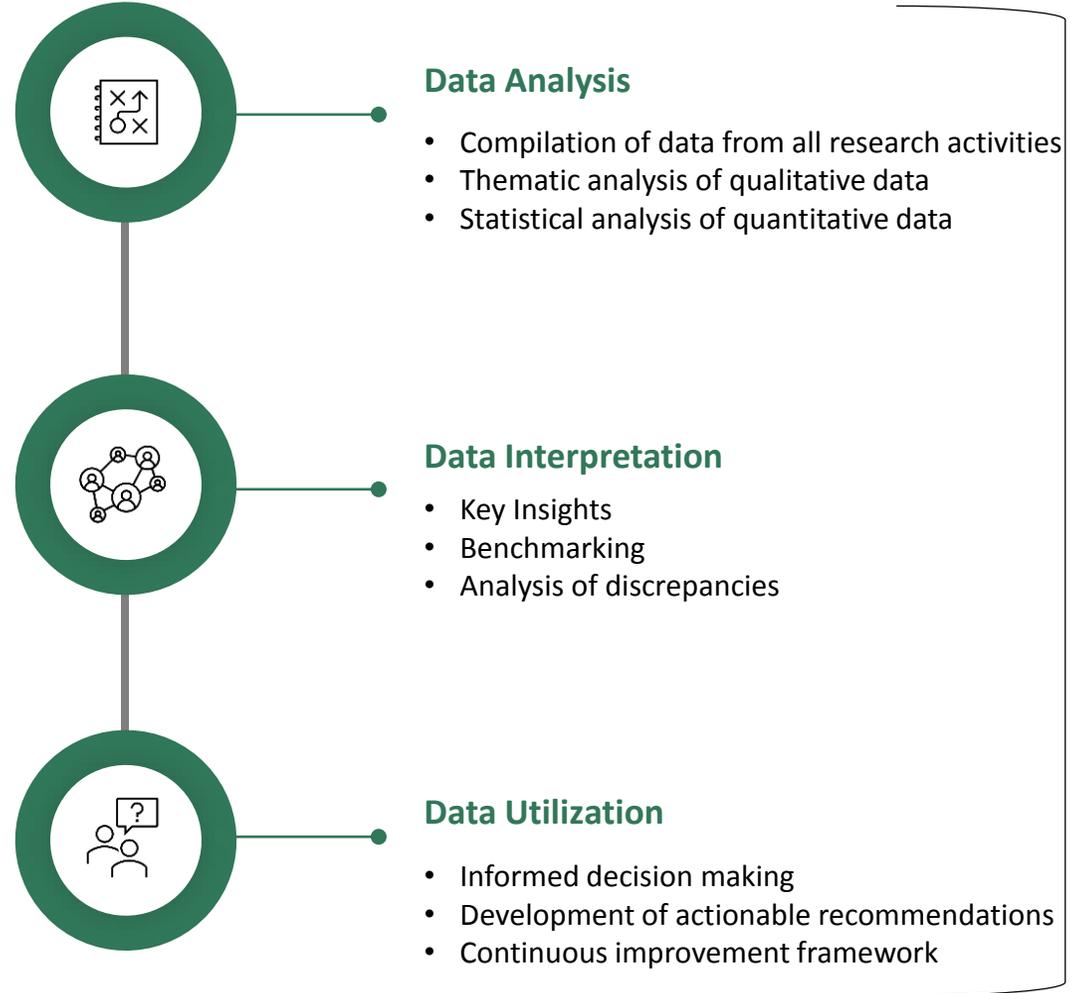
Research

Development

CX Strategy

Methodology: Interviews

XA facilitated 30 employee interviews and group workshops Norfolk County employees.

Objective: Employee interviews were conducted to understand the current customer experience landscape at Norfolk County , major challenges / barriers to delivering great service and important gaps that need to be closed.

The table below outlines the employees that were interviewed.

Name	Division	Role
Al Meneses	Office of the CAO	Chief Administrative Officer
Erin Anderson	Office of the CAO	Director, Human Resources
Stephanie Potter	Office of the CAO	Manager, Strategic Initiatives
Brandon Sloan	Community Development	General Manager, Community Development
Tricia Givens	Community Development	Director, Planning
Fritz Enzlin	Community Development	Director, Building
Nikki Slote	Community Development	Director, Recreation
Melissa Collver	Community Development	Director, Heritage and Culture
Heidy Vandyk	Corporate Services	General Manager, Corporate Services
Katherine McCurdy	Corporate Services	Director, Corporate Customer Services and Communications
Brent Wallace	Corporate Services	Director, Information Technology
Meghan Steinhoff	Corporate Services	Supervisor, ServiceNorfolk
Lauren Harrington	Corporate Services	CRM Systems Coordinator

Methodology: Employee Interviews

Name	Division	Role
Sam McFarlane	Corporate Services	Manager, Accessibility and special projects
Sarah Page	Health and Social Services	General Manager, Health and Social Services
Syed Shah	Health and Social Services	Director, Public Health
Stephanie Rice	Health and Social Services	Director, Social Services and Housing
Bill Cridland	Operations	General Manager. Operations
Devin Hunter	Operations	Director, Roads
Andrew Grice	Environment and Infrastructure Services	General Manager, Environment and Infrastructure Services
Stephanie Davis	Environment and Infrastructure Services	Director, Environmental Services
Genevieve Scharback	Office of the CAO	County Clerk
Marcia Annamunthodo	Health and Social Services	Program Manager, Professional Practice/ Quality Assurance and Chief Nursing Officer
John Regan	Community Development	Director, Strategic Innovation and Economic Development
Merissa Bokla	Environment and Infrastructure Services	Supervisor, Waste Management

Methodology: Group Employee Workshops

Name	Department	Role
Julius Vigh	Environmental and Infrastructure Services	Environmental Services Technologist
Adam Biddle	Operations	Supervisor, Forestry
Chris Thomson	Environmental and Infrastructure Services, Environmental Services	Supervisor, Roads Operations West Area
Debbie Mcintyre-Salens	Operations	Cemetery Operations Clerk
Wendy Robinson	Corporate Services	Casual Customer Service Representative
Angie Alward	Health and Social Services	Customer Service Representative
Gayla Mitchell	Corporate Services	Casual Customer Service Representative
Randi Myke	Health and Social Services	Customer Service Representative
Lori Houze	Corporate Services	ServiceNorfolk Agent
Ashley Gerencser	Corporate Services	Casual Customer Service Agent
Danielle Miller	Corporate Services	ServiceNorfolk Agent
Kaitlyn Poole	Corporate Services	ServiceNorfolk Agent
Lisa Pye	Corporate Services	Sr. Financial Analyst
Marie Cook	Office of the CAO	Licensing Officer
Tracey Rodrigues	Office of the CAO	Deputy Clerk
Jim Millson	Office of the CAO Division	Manager, Bylaw Services

Methodology: Group Employee Workshops

Name	Division	Role
Olivia Davies	Community Development	Planning Coordinator
Roxanne Lambrecht	Community Development	Zoning Administrator
Hannelore Yager	Community Development	Planner
Blaire Sylvester	Community Development	Coordinator, Business Development and Public Transport
Kayla Vaughan	Community Development	Customer Service Representative
Lisa Columbus	Community Development	Facilities Booking Clerk
Nicole Boyd-Cudney	Community Development	Sr. Instructor Guard
Susan Gardner	Community Development	Sr. Economic Development Officer
Allie Rutherford	Community Development	Recreation Coordinator
Merisa Kriwez	Community Development	Recreation Coordinator

Methodology: Employee Survey

XA deployed an Employee Service Feedback Survey to Norfolk County Employees that was available digitally through Survey Monkey.

Objective: The Employee Service Feedback Survey was conducted to gain insights on employee experiences while delivering services within their role and business unit and opinions of the current service delivery at The County . Employee input was used to develop Norfolk's long-term customer service strategy.

The table below outlines the deployment details of the Employee Feedback Survey.

Employee Survey Methodology	
Sample:	Norfolk County Employees
Timeframe:	Feb 1, 2024 – Feb 23, 2024
Sample Size:	160 responses

Methodology: Customer Survey

XA deployed a Customer Service Feedback Survey to Norfolk County Customers that was available digitally through Engage Norfolk Platform

Objective: The Customer Service Feedback Survey was conducted to gain insights on customer experiences interacting with Norfolk County's services while delivering services. Customer input was used to develop Norfolk's long-term customer service strategy.

The table below outlines the deployment details of the Customer Feedback Survey.

Customer Survey Methodology	
Sample:	Norfolk County Customers
Timeframe:	Feb 6, 2024 – Feb 23, 2024
Sample Size:	277 responses

Appendix II: Additional Details for CX-Related Service Agreements & Standards

Customer Experience (CX) Coordinator Position

Norfolk COUNTY

Additional details for the Customer Experience (CX) Coordinator Position.	

Details	The Customer Experience (CX) Coordinator will work closely with various internal and external stakeholders to ensure the effective implementation and corporate roll-out of the Norfolk County Customer Experience Strategy and Action Plan. The CX Coordinator will work collaboratively with Department and Division designates to develop and strengthen processes that support a customer-focused service experience. They will support CX improvement projects and initiatives that positively transform the end-to-end experience for Norfolk County Customers. The CX Coordinator brings expert understanding of business analysis, process improvement, strategy development and implementation. They are adept at building collaborative working relationships across business areas and project-based teams. They use a variety of methodologies and innovative approaches to solve problems and improve processes to better meet customer expectations. The CX Coordinator will also act as a project lead for the continued growth and enhancement of the Customer Relationship Manager (CRM) Software corporate initiative. This role will continue to identify service-level gaps while creating efficient and streamlined solutions across the corporation, improving the customer experience both internally across operational areas and externally with residents, visitors and businesses.

Norfolk COUNTY

Additional details for the external Service Level Agreements & Standards

Details	**Note: it is important that Norfolk County begin to measure their ability to meet these targets and score their performance to ensure that it is realistic to achieve before they make these figures a public commitment to the community.** **Key County employee commitments include:** • County employees help customers solve problems through providing accurate and timely information. It is important that The County provides service that is consistent and reliable so that it always meets customer expectations. • County employees will deliver services in a way that is kind and personable. Employees listen and are empathetic to your concerns and seek to resolve them in a friendly and professional manner. • County employees will make certain that all County services and programs are available to all residents. Employees will help remove barriers to service and ensure all residents have access to the services they need. • County employees will offer transparency communication and will follow-though on promises. Employees inform customers about expected timelines, deliver updates when appropriate, and communicate transparently. **Meetings and Public Consultations**: **Internal Meeting Requests** • All County appropriate meeting rooms / facilities / conference spaces must be added to outlook calendars so that their availability can be viewed, and individual rooms can be scheduled / booked by everyone across the organization. • All County staff members are required to keep their work-related outlook calendars up to date. • All in-person and virtual meetings are to be sent via digital request (for example MS Teams/Outlook). When sending a meeting request include the location, time, and a short meeting brief explaining the purpose of the meeting. **External Meeting Requests** • Employees are responsible for managing and booking all meetings with customers. • The meeting organizer is responsible for ensuring the meeting room is booked in advance. The meeting organizer is responsible to coordinate with the appropriate facility if there are incoming calls and/or notify of arrival. • If the County's IT department is required to set up equipment, a minimum of 48-hours in advance will be provided through the IT ticket system. **Public Consultations (formal meetings, townhalls, and/or events with external stakeholders)** • All County public consultations must be advertised a minimum of 2-weeks prior to the event date. • All public consultations must be accessible to all members of the public. When possible, virtual accommodations are to be made for all consultations. • When a study solicits public consultation, the public will be provided the outcomes or decisions of the study. • If the County's IT department is required to set up equipment at any facility, a minimum of 48-hours advance-notice will be provided with the specific IT requests. • When employees are representing the County at a meeting or event outside of the organization, employees are expected to represent the County in a positive, respectful manner and provide the same levels of customer service as they would when they are performing their regular duties.

Additional details for the external Service Level Agreements & Standards

Details	

In-person
- All customers will be acknowledged politely and professionally when entering any County facility.
- Appropriate service, direction, or information will be provided in a timely and courteous manner.

Telephone and Voicemail
- All telephone calls directed to ServiceNorfolk will be answered within 3mins by a County employee.
- ServiceNorfolk will assist customers if possible or will provide callers a warm transfer to the correct role. Callers will not be transferred to another line or voicemail without being made aware. Customers calling the correct area will have their issue resolved by involving as few County staff as possible.
- In the case that a telephone call is missed, all telephone calls (from both internal and external customers) will be returned within one business day.
- Personal voicemail greetings will be courteous, informative, and will direct the caller to leave a detailed message.
- Vacation or absence messages will be activated and will provide a back-up contact name and information while out of the office.

Email
- All emails will be acknowledged within 24 business hours.
- Vacation or absence messages will be activated and will provide a back-up contact name and information while out of the office.

Social Media
- All social media inquiries that require County response (e.g., complaints or inquiries through direct message) will be acknowledged within 4 business hours. An acknowledgement means that there is a reply to the inquiry and does not mean that the interaction has been resolved / closed.

Written Correspondence
- All written correspondence (i.e., postage, fax, hand delivered messages) will be stamped with a 'Received' date stamp on the day that it is received by the County.
- Written correspondence that requires a response will be acknowledged within 5 business days. If no contact information has been provided, an acknowledgment will be given to the customer as soon as possible. In the event that the employee requires more time to respond, an explanation will be provided, and an official response will be provided within 15 business days.

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