SDR - Call Handling Review Implementation
(CM13017/FCS13098)
General Issues Committee
Wednesday, December 4th, 2013
WE deliver high quality services that meet citizen needs and expectations, in a cost effective and responsible manner.

Strategic Objective 2.1

*Implement processes to improve services, leverage technology and validate cost effectiveness and efficiencies across the Corporation*

Strategic Action 2.1 (iii)

*Implement the call handling review recommendations.*
# Call Handling: a transformational project for the City

<table>
<thead>
<tr>
<th>Current State</th>
<th>Transformed Organization</th>
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</thead>
<tbody>
<tr>
<td>Internal Focus</td>
<td>Resident Focus</td>
</tr>
<tr>
<td>Service designed around technology</td>
<td><strong>Technology</strong> as an Enabler / Tool</td>
</tr>
<tr>
<td>Complex Process Design</td>
<td><strong>Simplify Process</strong></td>
</tr>
<tr>
<td>Inconsistent approach to common work</td>
<td><strong>Consistent</strong> approach for common work</td>
</tr>
<tr>
<td>Risk / Change adverse</td>
<td><strong>Continuous Improvement</strong></td>
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Acknowledgements

Commitment to sensational service, collective ownership and courageous change in the project work:

Call Handling Team Members:
Robin Cino, Delfina Duarte, Karen Gillen, Ken Heynes, Mary Kelly, John Lane, Grace Laufman, Mark Marangoni, Kirsten Marples, Kathy Martin, Glenda McArthur, Shane McCauley, Jennifer Mueller, Dio Ortiz, Nancy Purser, Steve Sevor, Angela Storey

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Service Delivery Strategy Team:
Teresa Bendo, Jennifer DiDomenico, Beth Goodger, John Hertel, Bill Janssen, Jane Lee, Maria McChesney, Pat Parker, Terry Quinn

Managers and Directors

Senior Management Team

Web & Service Channel Sub-Committee
Councillors Powers (Chair), Collins, Partridge & Pearson
Overview

• Background
• Process
• Overview of Recommendations
• What implementation looks like
• Financial & Staffing Implications
• Benefits
Background

The City of Hamilton’s 2012-2015 Strategic Plan has identified "Valued & Sustainable Services" as a strategic priority.

The Objectives of the Call Handling Review are to:

* Improve service to citizens
* Use a citizen-centred approach to simplify how citizens access our services and make it easier for them to do business with us
* Create efficiencies that support staff to better manage routine calls and allow them to focus on more complex work and provide more on-one-one time with the citizens who need it.

The Call Handling Review has two stages of work:

* Analysis, development and approval of plan recommendations (April 2013 – December 2013)
* Detailed design and implementation of approved plan (Scheduled to begin 2014)
Evolving Our Service Channels

Customer Service
- Documented & consistent business processes
- Customer Service Technology

Frontline Services
- Integration with business unit technology (e.g. Hansen, Amanda, Class, etc.)
- Feedback on customer experience to improve services

Simplify Access to City Services

Future Integration
## Call Handling Review Project Overview

<table>
<thead>
<tr>
<th>How calls are handled</th>
<th>175 numbers, 25 call handling areas</th>
</tr>
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<tbody>
<tr>
<td>Development of assessment criteria</td>
<td>What needs to be considered in moving a call?</td>
</tr>
<tr>
<td>Data collection &amp; process mapping</td>
<td>103 processes documented representing ~80% of calls</td>
</tr>
<tr>
<td>Application of assessment criteria</td>
<td>Assessment of risks and issues that need to be addressed to move a call</td>
</tr>
<tr>
<td>Analysis and draft recommendations</td>
<td>Staff review of consultant recommendations</td>
</tr>
<tr>
<td>Guiding Principles approved by SMT</td>
<td>Guidance for development of implementation plan</td>
</tr>
<tr>
<td>Development of high level Implementation Plan</td>
<td>Collaborative approach based on Guiding Principles</td>
</tr>
</tbody>
</table>

**Dec. 4th GIC**

**Approval of Implementation Plan**

Request for approval to proceed with detailed design & implementation
Overview of Recommendations

Recommendation a)
• Consolidate recommended call areas to simplify telephone access to City services & establish 546-CITY as a single point of contact for service and information calls coming into the City
• Acquire supporting technology to support a high call volume environment (Customer Relationship Management and Knowledge Management systems)

Recommendation b)
• Fund implementation costs from Reserves and repay from savings
  – $2.918 M implementation costs
  – Projected savings of $1M annually, following the two year implementation period
Overview of Recommendations (Cont’d)

Recommendation (c)
• Any staffing adjustments in accordance with collective bargaining agreements and reporting to Council as per Complement Control Policy

Recommendation (d)
• Reporting to Council on implementation progress, including tracking of departmental savings

Recommendation (e)
• Continue to pursue additional opportunities to improve citizen centred design of services and migration of services to lower cost service channels
How does it work?

**Customer Contact Centre**

**Knowledge Management System**
- Describes to agent how to answer the request (Resolve, Action it, Requires expertise)

**Customer Relationship Management System**
- Call information is entered
- If required, service request is initiated

**Business Unit**
- Complete service request and close work order

**Automated data flow to/from Business Unit**
- Automatically creates a service request in departmental technology and closes when complete

**Front Line Services**

905-546-CITY

7:30 AM to 8:00 PM

*Future: Web & Mobile Services*
Winnipeg 311 Online

Winnipeg 311 is more than a phone number. It's also an online resource that offers more ways to get information and access City services. Click one of the tabs below in order to see the available options.

If the service request or information you are looking for is not available online, please contact 311 using any of the contact options listed in the "Contact Us" box below.

I Want To...

- Request or Report
- Register or Apply
- Pay
- Get Info

Crime - non-violent incidents with no suspects
Report damage to property or vehicles, theft, lost property and add information to existing police reports.
Detailed Design & Implementation

Phase 1

• Establish a Project Management Implementation Team
• Develop an overall project plan
• Acquire technology (knowledge management and customer relationship management systems)
• Transition Plan for Customer Contact Centre (CCC) to ensure readiness for increased call volumes

Phases 2 – 7

• Staged transition of calls
• Detailed design process with each call area before transitioning calls
## Proposed Implementation Schedule

<table>
<thead>
<tr>
<th>Phase</th>
<th>Area To Consolidate</th>
<th>Proposed Timeline</th>
</tr>
</thead>
</table>
| Phase 2 | • Water  
          • Facilities  
          • Tax  
          *Installation of new technology*               | April 1 – June 30, 2014                |
| Phase 3 | • Roads                                               | July 1 – September 30, 2014            |
| Phase 4 | • Forestry  
          • Parks  
          • Waste  
          • Building Construction  
          • Building Services                  | October 1 – December 31, 2014         |
| Phase 5 | • Immunization Program**  
          • OW General Inquiries  
          • OW Intake  
          • OW Special Supports               | January 1 – April 30, 2015            |
| Phase 6 | • Animal Services  
          • Parking  
          • Business Licensing  
          • Lottery Licensing  
          • Property Standards                | May 1 – August 30, 2015               |
| Phase 7 | • Recreation Facilities  
          • Recreation Registration  
          • Transit – ATS  
          • Transit                                       | October 1 – December 31, 2015        |

**pending review of new system**
## Implementation Costs ($000s)

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase &amp; installation of Knowledge Management and Customer Relationship Management Software</td>
<td>2,038</td>
<td>2,038</td>
<td></td>
</tr>
<tr>
<td>External support</td>
<td>150</td>
<td>95</td>
<td>55</td>
</tr>
<tr>
<td>Process Re-engineering</td>
<td>150</td>
<td>100</td>
<td>50</td>
</tr>
<tr>
<td>Customer Contact Centre workspace expansion</td>
<td>50</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Project Management &amp; Coordination</td>
<td>530</td>
<td>280</td>
<td>250</td>
</tr>
<tr>
<td><strong>Total Request</strong></td>
<td><strong>$2,918</strong></td>
<td><strong>$2,563</strong></td>
<td><strong>$355</strong></td>
</tr>
</tbody>
</table>

Repayment of reserves within 5 years through savings
Reserve Repayment

- $1 Million minimum projected annual savings have been identified by department (Table 1)
- Detailed design is to be completed to confirm requirements for successful transition of work (i.e. calls & off-call work)
- Confirmed savings are transferred from departmental base budget account to a corporate financial account for visible tracking of repayment to reserves and eventual reinvestment/savings
- Corporate financial account is maintained until implementation costs are repaid
- Upon completion of the repayment of reserves, staff will report back to Council on the accumulated savings for their consideration
Staffing Implications

• Transition period to implement and reach an optimized staffing model

• Overall net reduction in staffing levels as a result of implementation (15 to 22 FTEs)
  – FTE transfers and changes within each call handling area will be determined in detailed design
  – Includes an increase in staffing at the Customer Contact centre (10 FTEs) to support additional call volumes and create an effective and managed call environment that ensures information is always current and relationships with departments are maintained
  – Being conservative at $1 Million minimum projected annual savings have been identified by department (Table 1)

• Human Resources
  – Planning Guidelines (Appendix B)
  – Consultation with Unions
Benefits

• **For the citizen** - Improved customer service (longer service hours at Customer Contact Centre, single number, simpler for resident, calls answered on first call, speed of answer, skills and quality)

• **For Councillors and Departments** - less time on routine calls and more time for complex work

• **Improving Services** – Reporting for performance monitoring and improvement -- tune into constituent needs and identify opportunities to improve services

• **For Employees** – better tools to provide sensational service

• **Future expansion** - Technology & processes can be used for web and mobile services, evolving our service channels

• **For the taxpayer** – single investment in technology, quality, consistency, skills and training means better value for $

• **Financial Sustainability** - $1M in ongoing savings
Questions?