CX Implementation Plan Overview

Corporate Services, Strategy, Risk and Accountability Committee

May 5, 2021

CX Vision

⭐ ⭐ ⭐ ⭐ ❤️

We are an empowered team, building lifelong relationships and trust, through outstanding customer service and innovative solutions.

CITY OF **Burlington**

Corporate Strategic Alignment

Focus Area 5 - Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

We will achieve...	We will need to execute on these initiatives...	We will know we are successful when...
Greater organizational effectiveness and technology transformation with our commitment to...	**KEY ACTIONS**	• Annually 90% of project outcomes completed on schedule and within budget
1. Ensuring that strategic initiatives and corporate projects are resourced and sustained	• Complete the functional realignment of the City Manager's office	• Increase the number of on-line self-service options by 10% by 2022
2. Ensuring efficient, effective and economical service delivery	• Initiate a corporate-wide service review program	• Invest in technology transformation*
3. Enhancing City services and delivery of citizen self-service options through technology	• Deliver on time, on budget and achieve realized benefits (outcomes) for major corporate technology projects; Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), Enterprise Asset Maintenance System (EAMS), Business Intelligence (BI) and an upgraded case management development application system (AMANDA 7)	• Ensure less than 20% of legacy systems use older than 5 years by 2022
4. Ensuring financial sustainability with a reasonable tax rate increase that focuses on citizen services		• Annually increase the total IT investment directed towards service delivery improvements and efficiencies*
5. Delivering on efficient and effective project management and accountable corporate performance		• Complete the implementation of a corporate-wide CRM system*
6. Increasing corporate resilience to cyber-security threats through effective and proactive IT security management practices	• Continue implementation of the Corporate IT Strategy inclusive of an IT security framework	• Balance the ratio of funding invested for business improvements to funding invested in complete business transformation*
7. Investing in customer centric digital technologies	• Engage council and management to review and improve the city's budgeting processes	• Increase the tax rate at the rate of inflation (excluding infrastructure and increase in services)
	• Assess the feasibility of multi-year budgeting	• Ensure stabilization reserve funds as a % of net revenues between 10-15%
	• Develop corporate performance measures and a citizen dashboard to communicate the progress of the corporate workplan	• Ensure debt charges as a % of net revenues are below 12.5%

Strategic Alignment & Integration
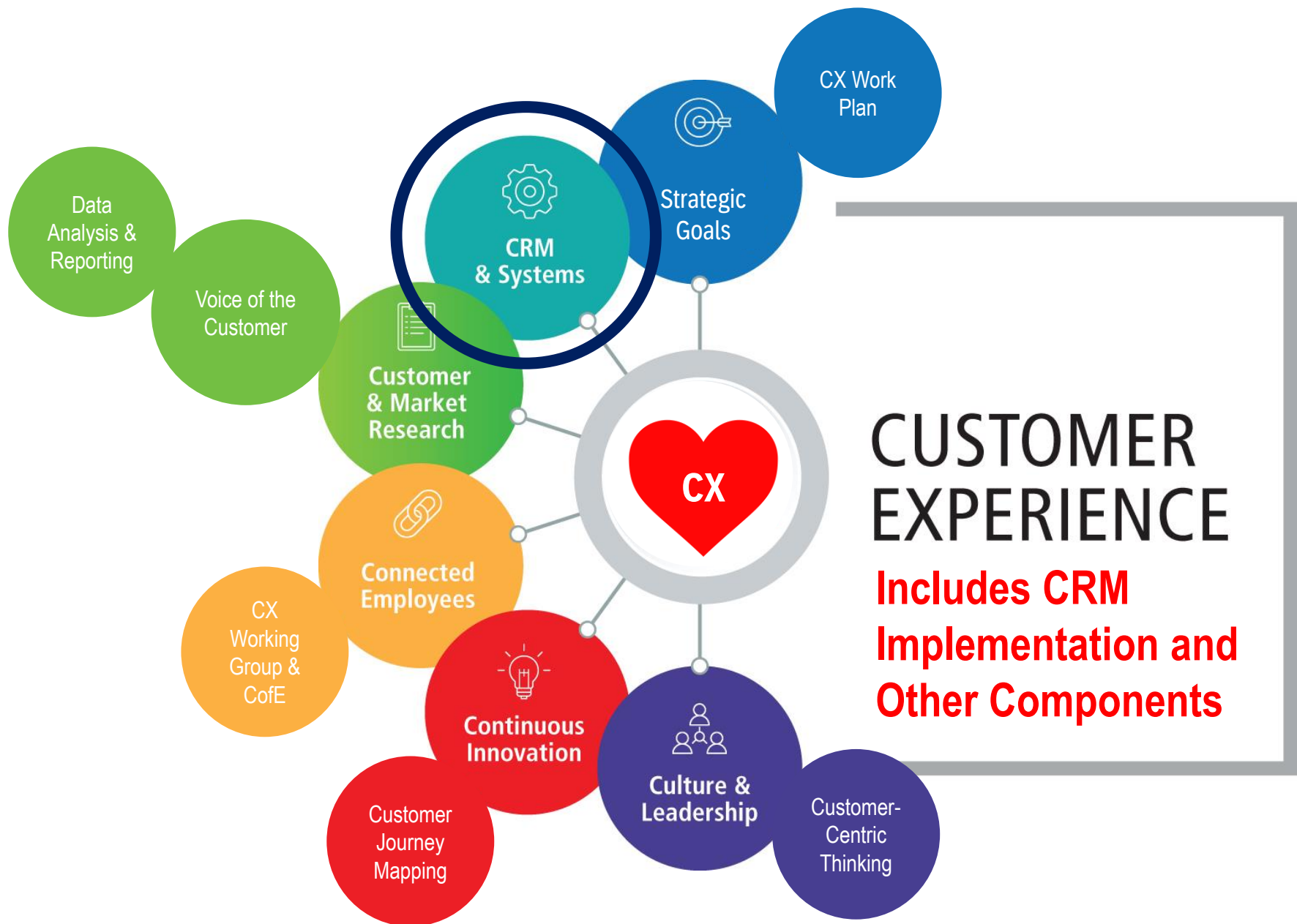
Burlington's Strategic Plan

Vision to Focus

CX Vision and Strategy

Burlington's Strategic Plan 2015 – 2040

2018-2022 Burlington's Plan Updated Sept. 2019
FROM VISION TO FOCUS

Our Guiding Principles are the Five E's for Exceptional Customer Experience

Engage   Enable   Educate   Empower   Enhance

CX Implementation Plan

CUSTOMER EXPERIENCE

Includes CRM Implementation and Other Components

Data Analysis & Reporting

Voice of the Customer

CRM & Systems

Strategic Goals

CX Work Plan

Customer & Market Research

Connected Employees

CX Working Group & CofE

Continuous Innovation

Customer Journey Mapping

Culture & Leadership

Customer-Centric Thinking

CX

CITY OF Burlington

Governance

Council

Corporate Sponsor – City Manager

Burlington Leadership Team

Customer Experience Steering Committee (CXSC)

Strategic Lead & CX Program Team

Connections & Partnerships

One Window	One Brand	Burlington EcDev	Other Cities	Forrester

Strategic Lead & CX Program Team

CX Working Group	CRM-Enabled Services	Non-CRM-Enabled Services	IT Services	Communications

Why a CX Implementation Plan?

- Complement to the CX Vision and Strategy

- Identify key activities that are needed in the coming year to advance strategic goals

- Provide framework and foundation for a detailed CX Work Plan

- Informs the City's brand promise, and will closely connect with One Brand initiatives

- **This is a shared plan for the whole organization**

Shaping a CX Implementation Plan

- ♥5 Workshops in Fall 2020 involving 56 staff
- ♥BLT Workshop with Forrester January 2021
- ♥CX Program, CX Working Group
- ♥CRM Project Team
- ♥CX Steering Committee
- ♥BLT endorsement March 2021
- ♥One Brand will be a profound influence in future

Build Trust and Confidence

The CX Program will be a **trusted partner and advisor** to all City services in the delivery of outstanding customer experiences.

Success Looks Like
- Organization-wide, City staff clearly understand the CX Program's role and value
- The CX Program is engaged early on to improve customer-facing initiatives

Top Priority Tasks
- Develop and deliver a corporate CX Education Plan
- Deliver outstanding CX to internal and external stakeholders
- Represent the City's CX brand of five star service with heart
- Coordinate a Centre of Excellence for CX skills and competencies

Benefits and Impact
- Increased knowledge and application of CX practices across the City
- Greater cross-departmental collaboration on providing great CX
- Customer-centric mindset

Manage Change

The CX Program will use **leading practices** for effective change management including the ADKAR model and Prosci methodologies.

Success Looks Like
- CX Program initiatives are viewed as opportunities for the organization
- Key stakeholders feel comfortable, confident and committed

Top Priority Tasks
- Focus on increasing Awareness, Desire and Knowledge
- Finalize and implement the CX Change Management Plan
- Communicate early, well and often through multiple channels

Benefits and Impact
- Structured approach to change, including individual change journeys
- Excitement and anticipation for CRM System implementation
- Integration of customer-centric thinking to all aspects of City services

Enhance Digital CX

The CX Program will **advocate for digital transformation** and partner with Corporate Communications, IT Services and other stakeholders to provide **outstanding digital services** for the customer.

Success Looks Like
- Digital services fully reflect the City's brand promise
- Digital CX is easy, simple, intuitive and accessible

Top Priority Tasks
- Partner with Communications on website modernization
- Advocate for customer-centric design in online services
- Integration of customer-facing data where required

Benefits and Impact
- A modern City website that delivers outstanding digital CX
- Compliance with AODA legislation for information and communications
- Successful integration of customer-facing data and systems

Report on Progress

The CX Program will **establish Key Performance Indicators** that are specific, measurable, attainable, relevant and timely.

Success Looks Like
- Key stakeholders receive data-driven KPIs on a regular basis
- Meaningful action is taken as the result of CX trend analysis and insights

Top Priority Tasks
- Share stories of great CX across the organization
- Establish Voice of the Customer initiatives
- Develop data-driven dashboards to analyze and monitor CX trends
- Complete customer journey mapping for processes where cycle time is an issue

Benefits and Impact
- Data-driven dashboards available on CX progress and KPIs
- Frequent communication on CX good news stories, trends and insights
- Better data available for customer cycle times and process hurdles
- Well-informed communication with customers

Operationalize CRM System

The CX Program will **support, prepare and enable CRM users** with a successful operational model following CRM project close.

Success Looks Like
- The City's CRM user community feels well-supported
- Successful operation and vendor relationship for the CRM system

Top Priority Tasks
- Continued CRM implementation in additional departments
- Ongoing training and support for the CRM user community
- Well-documented business processes and technical configuration

Benefits and Impact
- Fully operational CRM usage across 9 public-facing departments
- Demonstrated ROI for system implementation and investment

It's getting easier to know and recognize the City's customers.

Year over year, the City is increasing customer contact record creation in the CRM system and thereby increasing the ability to know who our customers are.

Comparison Year over Year - CRM Contacts
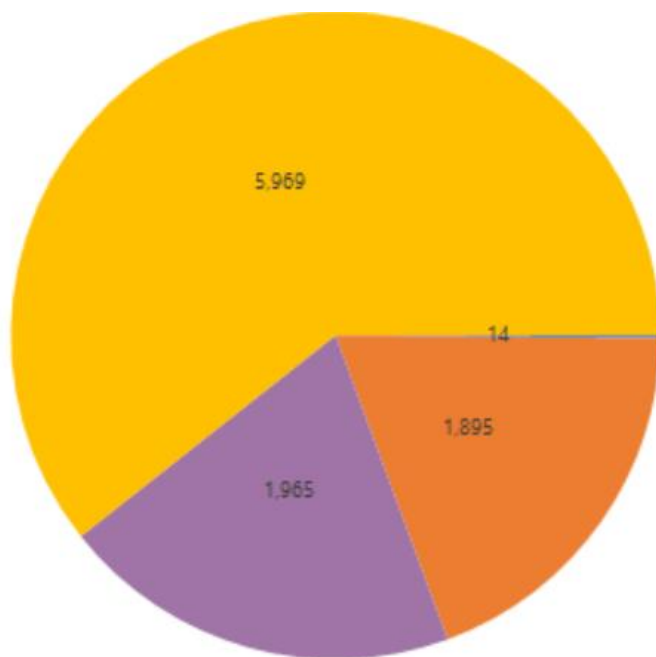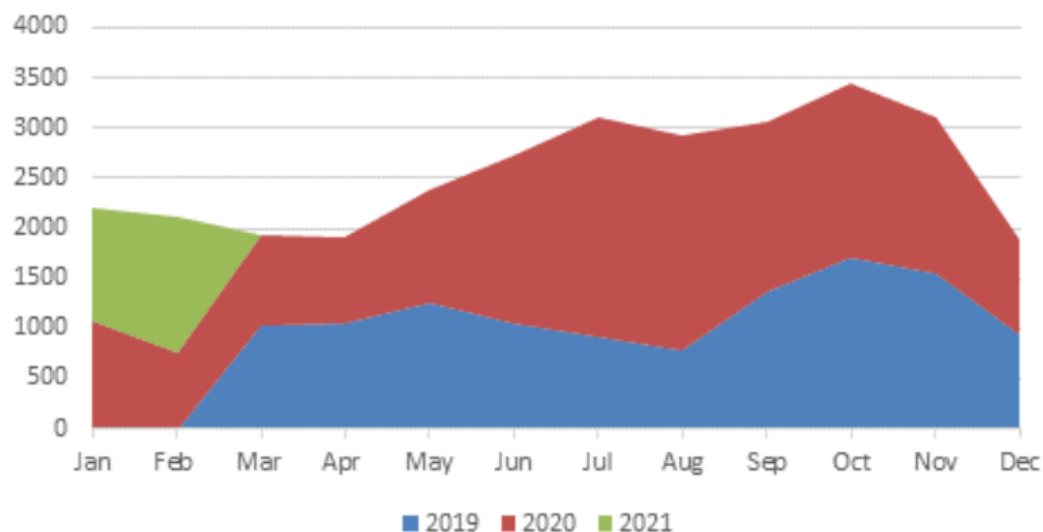
Telephone contact is still incredibly important.

Telephone (see yellow area) is far and away the top method that customers are using in 2021 to contact Service Burlington and CRM-enabled departments.

Customers want information first.

In 2021 so far, the vast majority of customer enquiries at first point of contact are requests for information (see blue area). Customers are currently 2x more likely to request information at the first point of contact than to request a specific service.

Much of this trend is due to COVID-19, and a significant volume of requests for information on Regional Services including vaccination clinics.

9,909

Case Count

Request Classification
- Information
- Service
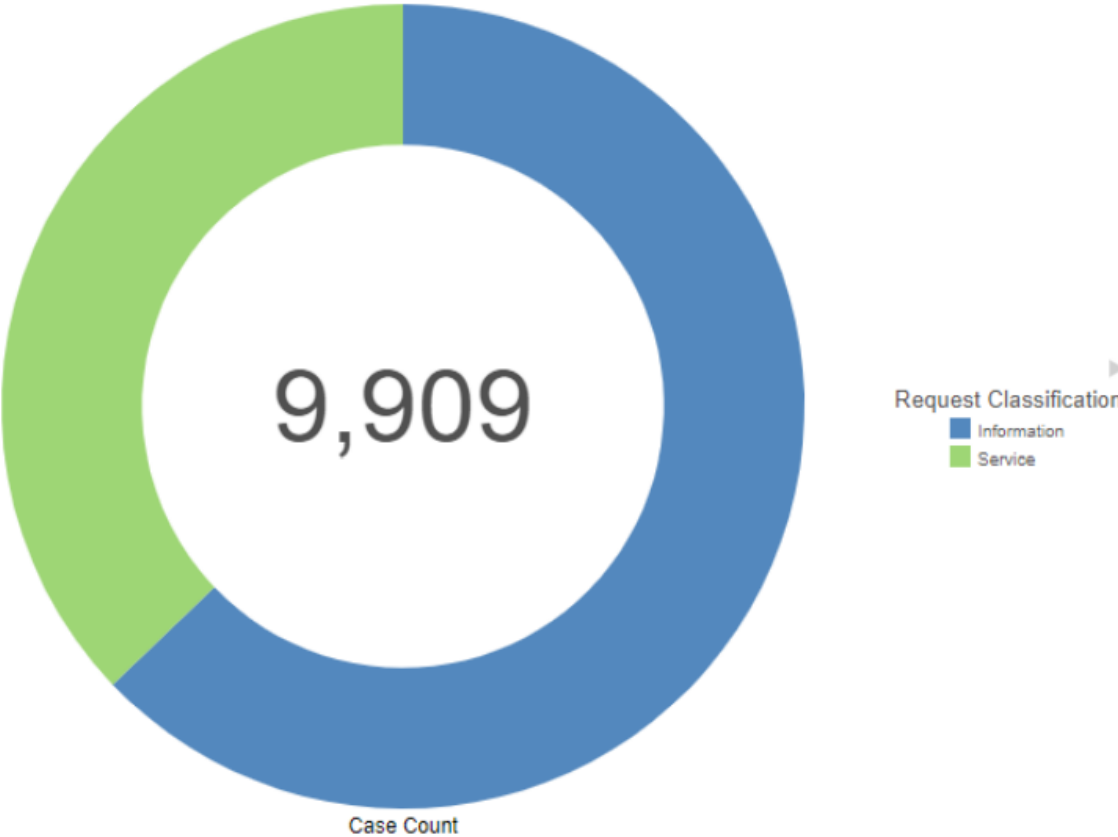
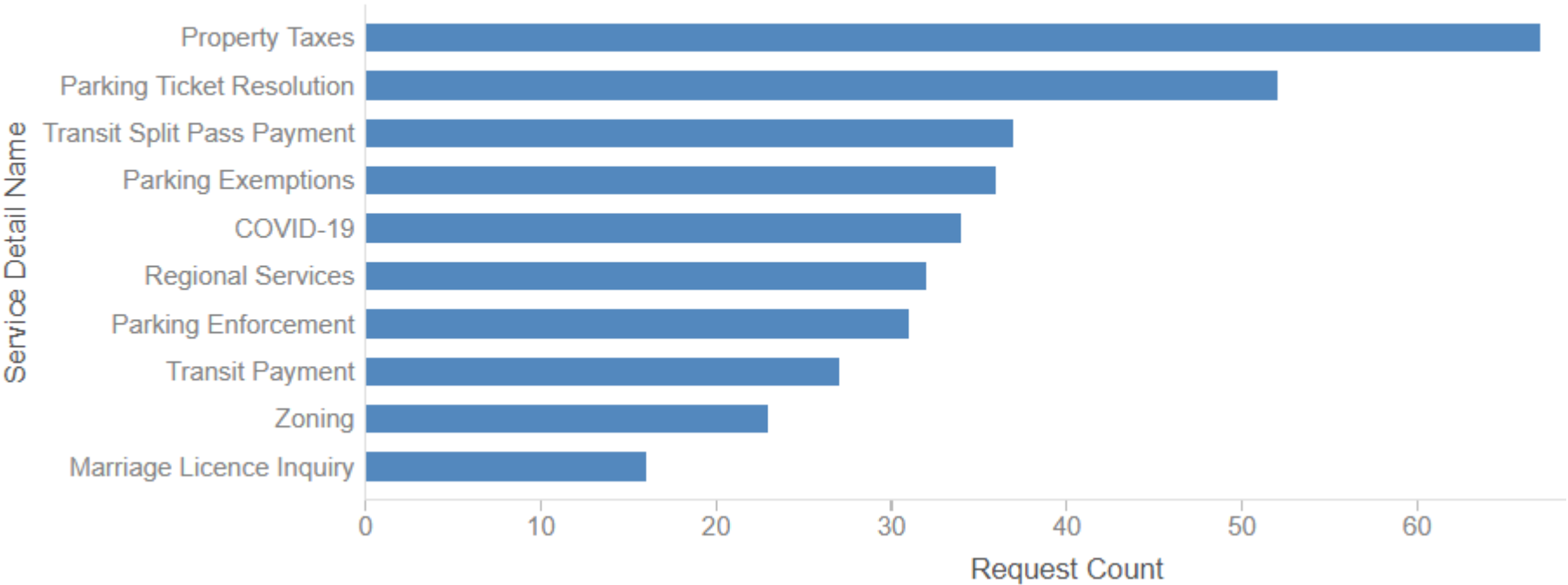**Customers who have their requests managed in the CRM system overwhelmingly rate their service experience as Excellent.**

How was your service experience?

Experience	Amount
Excellent	707
Fair	28
Good	31
Poor	82
Very Good	59
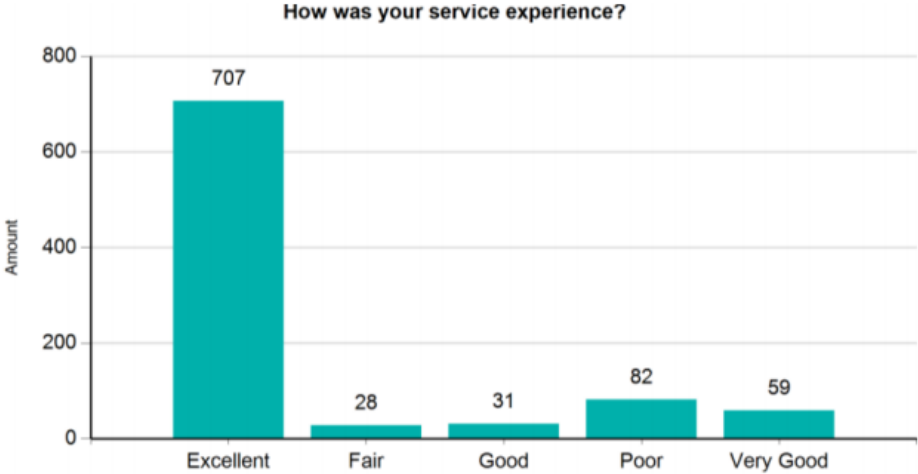
COVID-19 and Regional Services continue to be among the City's Top 10 CRM request types.

Top 10 Requests By Type

Customer Experience & DEOO Required Future State Activities

Customer Experience (CX)

- CX Strategic Goals
- CX Centre of Excellence
- CX Working Group
- Trusted CX liaison & advisor
- Data analysis & reporting
- Change management
- CX education
- Customer Journey Mapping
- Voice of the Customer

Service Burlington

- Central contact centre
- First point of contact
- Notice customer trends
- CX skills development
- Relationship building
- Quality assurance
- Service Level Agreements
- Liaison re: KBAs
- Utilize CX standards
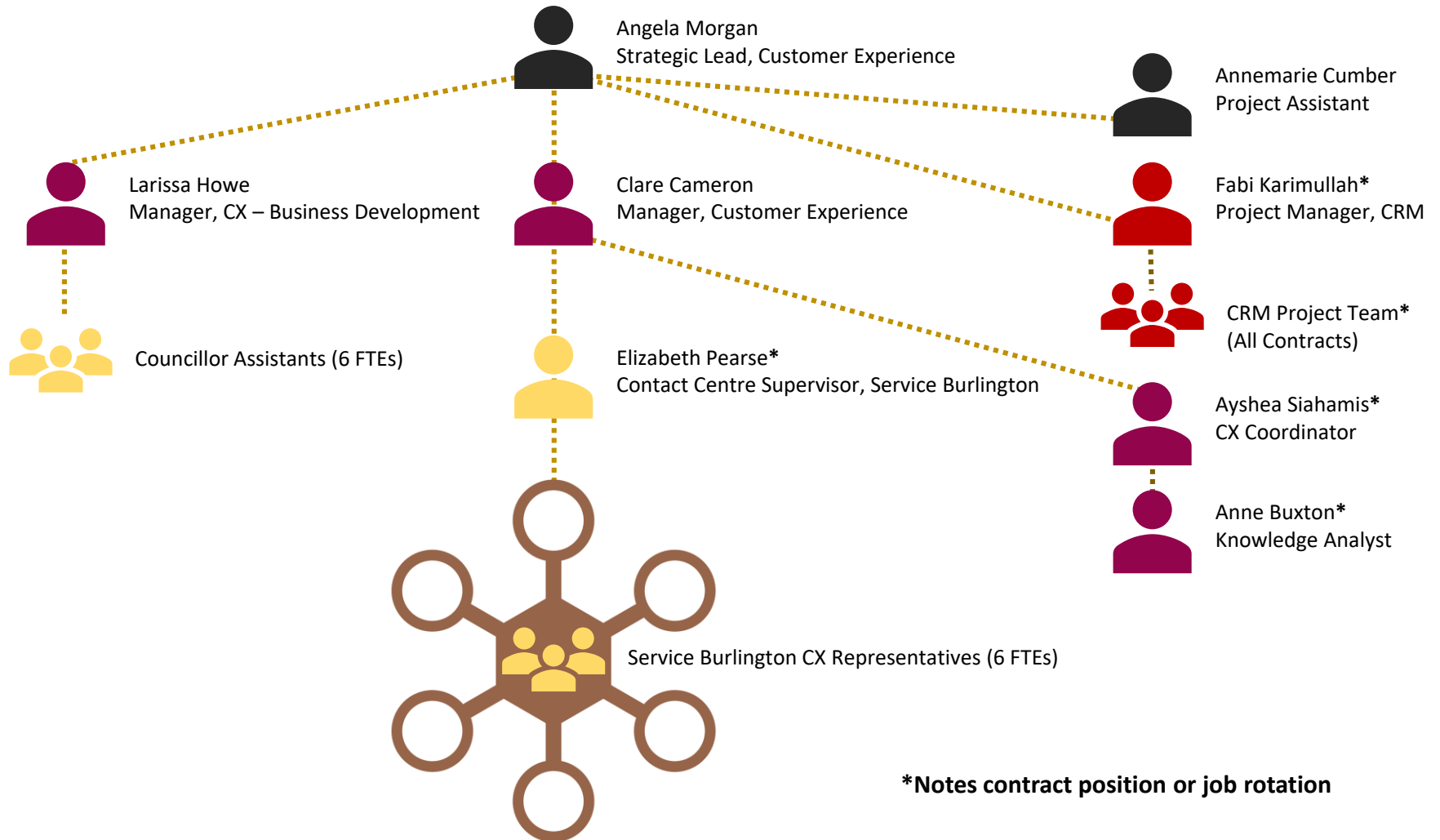- Functional directory

CRM Administration

- Technical support
- CRM knowledge
- Supporting CRM users
- System configuration
- Security configuration
- Training
- Enabling new CRM use
- Scoping requirements
- Vendor relationship
- Knowledge Base growth
- Quality assurance

Councillor Assistants

- Constituent enquiries
- CRM users for City business

Current CX Program Team

Angela Morgan
Strategic Lead, Customer Experience

Annemarie Cumber
Project Assistant

Larissa Howe
Manager, CX – Business Development

Clare Cameron
Manager, Customer Experience

Fabi Karimullah*
Project Manager, CRM

Councillor Assistants (6 FTEs)

Elizabeth Pearse*
Contact Centre Supervisor, Service Burlington

CRM Project Team***
(All Contracts)

Ayshea Siahamis*
CX Coordinator

Anne Buxton*
Knowledge Analyst

Service Burlington CX Representatives (6 FTEs)

***Notes contract position or job rotation**

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IMPLEMENTATION TIMELINE (PROPOSED)

May 2021

- Report to Council

Q2

- CX Work Plan
- Privacy Impact Assessment ongoing
- Customer Journey Mapping skills
- Staffing model CRM implementation
- Website modernization start

Q3

- Online Forms Process
- Customer Service Standards
- Operating Budget request

Q4

- Voice of the Customer pilot
- CX Centre of Excellence
- CX Education launch

2022

Q1

Q2

- CRM Implementation Continues

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Questions and Discussion

CX Implementation Plan

May 5, 2021