



**SUBJECT:** City-wide customer experience optimization and operationalization of CRM system

**TO:** Corporate Services, Strategy, Risk & Accountability Cttee.

**FROM:** City Manager's Office

Report Number: CX-01-22

Wards Affected: All

File Numbers: 101-08

Date to Committee: February 2, 2022

Date to Council: February 15, 2022

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### **Recommendation:**

Receive and file customer experience department report CX-01-22 providing an update on city-wide customer experience optimization and operationalization of the CRM system.

### **PURPOSE:**

#### **Vision to Focus Alignment:**

- Deliver customer centric services with a focus on efficiency and technology transformation

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### **Background and Discussion:**

This report is in response to the following Staff Direction from the December 6, 2021 Corporate Services, Strategy, Risk and Accountability meeting:

“Direct the City Manager to report back by the end of Q1 2022 with a plan on the operationalization of the customer relationship management (CRM) platform including support for ongoing Council/constituent relations, city-wide customer experience optimization and full integration with major information technology projects, including but not limited to enterprise resource planning (ERP), enterprise asset management solution (EAMS) and Burlington.ca website redesign.”

## **Customer Experience Strategy**

The Customer Experience Strategy approved in 2016 and updated in 2021 guides the implementation of corporate initiatives that impact the City's customers, and the delivery of information and services to those customers.

### **Customer Experience Vision**

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

### **Customer Experience Objectives**

*Hear Me:* We will listen to our customers and understand the importance of what they tell us

*Know Me:* We will know our customers - what they need, what they expect, and how they think we can improve

*Inform and Assist Me:* We will be responsive and proactive to give our customers the best Burlington experience possible

The Customer Experience (CX) Implementation Plan endorsed by Council in May 2021 describes five Key Activities which the City's CX Program will focus on to advance and accomplish the corporate CX strategy. It supports the realization of CX strategic goals by identifying clear and specific tactical steps within these areas:

- Build Trust and Confidence – Across the organization, cultivate a stronger understanding of CX principles, methods and goals. Brand the internal CX program and coordinate a Centre of Excellence to assist all customer-facing services
- Report on Progress – Share data on successes, challenges and insights about customer behaviour and needs. Coordinate Voice of the Customer initiatives.
- Manage Change – Utilize best practices in the organization for effective change management and ongoing communications
- Enhance Digital CX – Partner closely with Communications and contribute to the burlington.ca Web Modernization project. Manage Online Forms as an aspect of service design and coordinate customer-facing digital experiences
- Operationalize CRM – Transition the former CRM Project to fully functional and well-supported operational state. Continue further CRM system implementations to all customer-facing services.

Since endorsement by Council, 86% of the 116 recommended activities and related tasks described in this plan are either complete, established as operational items or currently in progress.

This plan also provides the foundation for the CX Work Plan, which is a detailed timeline of prioritized tasks with clear assignment and responsibility for delivery across the City by various roles on the CX Program team.

### **CRM As Part of Digital Transformation**

The CRM platform is an essential tool to support customers through their end-to-end engagement journeys and provides us the ability to see the outside-in perspective. As a key component of the Customer Experience Strategy the CRM enables a great customer experience and supports customer interactions over a range of channels and touchpoints leveraging vast amounts of interaction, behavioural and transaction data to deliver experiences that add value to the customer and preserve the City's brand.

Customer relationship has become multi-channel, according to a study published by Genesys, 35% of customers use more than 4 channels to contact their customer service. Today's customer is uber-connected and demanding service through online, self-care portals, social networks and many other channels. At the same time, the phone is still the most widely used channel to contact customer service including Service Burlington and studies have shown that it is also the most satisfying for the customer. This is why the CRM platform and improved CRM tools offer a range of opportunities to support a multi-channel approach and digital transformation.

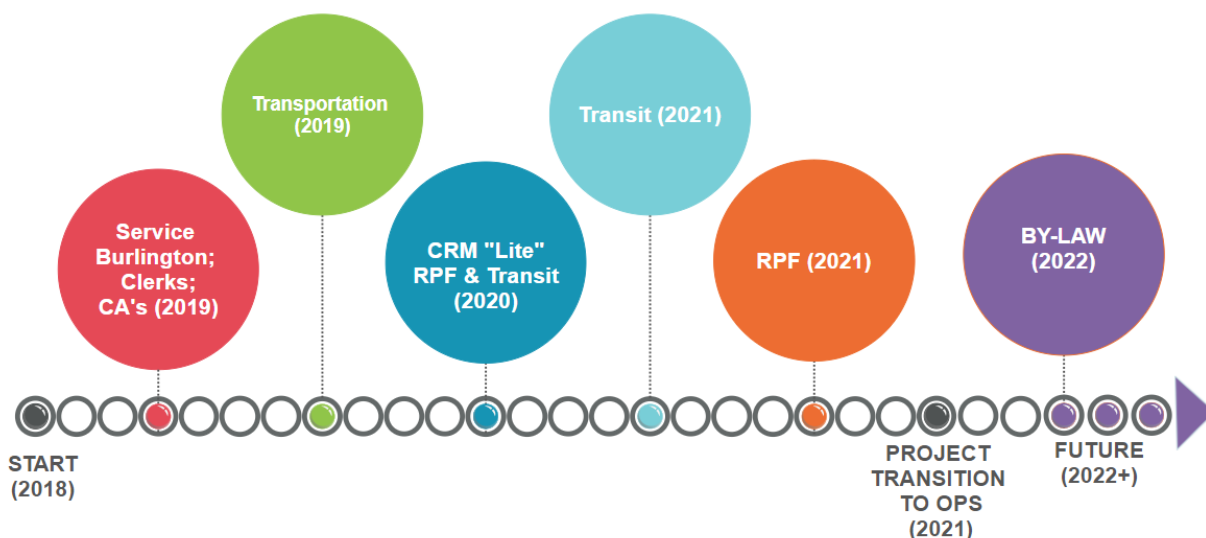
Ongoing improvements to the CRM as a platform are a critical component of a customer-focused digital transformation.

### **The Evolution of CRM at the City**

To transform the way the City interacts with its customers, one of the key goals within the CX strategy was the implementation of a centralized customer contact center supported by a Customer Relationship Management (CRM) system.

The CRM project commenced in 2018 following award of the CRM software implementation contract to Rock Solid Technologies Inc. A team was formed to implement the system in accordance with the initial Project Charter and vendor Statement of Work (SOW). The Charter and SOW addressed implementation to the following service areas: Service Burlington & Clerks, Council Offices, Transit, Transportation, RPF and Planning & Building (one department at the time of the contract).

Summary of progress to date:



Implementation of the CRM involves several phases to transition Tier 1 customer services enquiries to Service Burlington and identify Tier 2 enquiries that need to be managed by the service department. Due to the complexity of transitioning processes and capturing them in a system which did not exist before, some of these phases are iterative.



The CRM has furthered the CX strategy with each onboarded department to:

*Hear Me*

- Simplify email and telephone contacts from customers' perspective to one number (905-335-7777) and one email (city@burlington.ca)
- Provide a contact center that can adapt with greater flexibility, including part time staff and after-hours live answer options, to respond to customers in a timely manner during busy periods for each service area
- Enable consistency in customer experience and quantitative performance management across all service areas with service level standards that are established as each department is onboarded
- Allow departments and subject matter experts more time to focus on core work and complex customer experiences, by shifting first point of contact to Service Burlington for immediate response

*Know Me*

- Improve access and follow up by providing a centralized database of customer interactions, including centralized customer contact records and history
- Allow the City to understand customers more holistically by recognizing unique individuals
- Provide data on customer requests, trends and insights to departments to support business and service decisions
- *Inform and Assist Me*
- Enable a fully trained contact center to help customers understand and learn about City services through Knowledge Base Articles (KBAs)
- Streamline CRM self-service options via online channels including the CRM customer portal and Online Services page on burlington.ca
- Resolve more customer enquiries at first point of contact, so that an increasing percentage of customers can receive the full response they need through Service Burlington without requiring forward to another department

Additional benefits have been achieved including:

- Continuing to consolidate customer service delivery through Service Burlington and implementing CRM despite the pandemic to deliver on all departments in the original CRM Project Charter except for Community Planning & City Building
- supporting Service Burlington and customers with up-to-date changes throughout the pandemic using Knowledge Base Articles and regular communication with Halton Region
- additional features in CRM that provide announcements and notes for additional up to the minute information sharing across the Service Burlington contact centre
- enablement of full contact centre operation with CRM through email, web and telephone access from remote work locations; assisting in pandemic response and creating new opportunities for new emergency contact centre operation when required
- deployment of the CRM with integrated telephony to Service Burlington staff working from home, providing live customer service consistently and without disruption for customers through the COVID-19 pandemic

The project has encountered significant challenges including but not limited to: resistance to the change in the customer service model; changes in staff roles & responsibilities; project team turnover; and, the impact of the COVID-19 pandemic. Despite the challenges, the project team has continued to deliver on new department implementations. Appendix A outlines the data captured by the CRM including the growth in cases managed and resolved by Service Burlington through training and use of the system.

Significant changes and developments for the CRM Project over the last 2 years include:

- Strategic repositioning in 2020 through a consulting engagement to identify impacts and address resistance;
- A revised Customer Experience Strategy to support CRM and CX objectives;
- Dissolution of Project Management Office and evolution of the Customer Experience department to include Service Burlington, oversee and deliver new CRM implementations, existing CRM “onboarded” departments and entrench broader CX objectives to achieve broader successes across the entire organization;
- A Constituency Records Management System recommendation to remove and separate Councillor related constituent activity from the CRM to address security concerns and ensure separation of constituency records from City business;
- Scope changes including CRM-EAMS data integration and other integrations which required assessment of existing middleware technology;
- Approval of the Web Modernization initiative which, with the increasing use of CRM and other major online applications, revealed the need for a City-wide web service delivery architecture review.

A key component of new CRM deployments is integrations with downstream work order systems. The system is currently integrated with Tree Plotter for RPF forestry enquiries. Future integrations include: Cartegraph (EAMS) for RPF, Transportation and other departments; and AMANDA. Additional integrations may be identified to support customer enquiry management in future. Appropriate planning of technology and resources is required to sustain any increase in integrations.

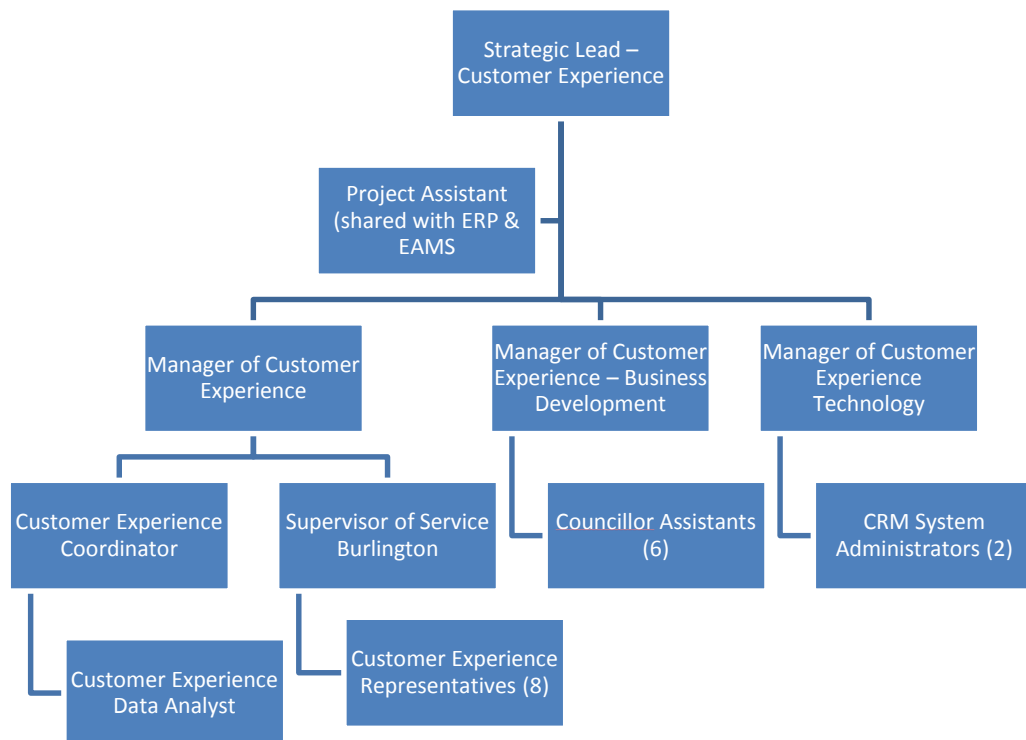
The CRM Project Charter was limited, with the understanding that additional City departments would be onboarded to the CRM and consolidated contact center model through an operationalized delivery model. Retention of skilled internal staff resources on the CX team are required to support new CRM deployment and continuous improvement initiatives, user support as well as workplan initiatives to support our Customer Experience strategic objectives.

## **Designing & Evolving Our Organization**

The City will require an enhanced Customer Experience operating model to deliver on services and activities related to the CX Strategy and the CRM. It should be noted that as departments are onboarded there is a redeployment of the appropriate resources from the department to Service Burlington to manage the increase in workload. The following positions have been identified in the future state operating model with impacts to ITS and CX positions:

- CRM System Administrators (2) – technology support for new implementations and operational changes, training of new users and user support. Capital funding was secured for these 2 positions. These positions are planned to be included as operating budget requests in 2023.
- Customer Experience Coordinator – change management, training, Voice of the Customer Program and continuous improvement from the customer perspective (currently over complement and planned to be included as operating budget request in 2024)
- Customer Experience Data Analyst – support data driven insights through business intelligence platform, CRM and related applications (currently over complement and planned to be included as operating budget request in 2024)
- Customer Experience Business Analyst – to support new implementations, customer experience process improvements and journey mapping (currently funded as part of capital budget – this position would reside in IT and is part of their future DEOO)
- Customer Experience Technology Manager – manage new CRM project implementations, coordinate CX integrations and upgrades, key role in CX component of web modernization and new technology (the FTE for this position is currently “on loan” from IT, an FTE request is planned for 2024 operating budget)

### Customer Experience Organization Chart (Revised)



## **Council and Constituent Relations**

There are specific provisions in the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA) that distinguish how City records and constituent records are handled. In the initial implementation of the CRM for the Councillor's office the project team had implemented a security model that at the time, with limited users of the CRM, met the intent of the legislation. However, after onboarding additional departments and an expansion of the users, it was determined that the security model was not adequate to address the requirements under MFIPPA and a decision was made to separate city records and constituent records. With input and guidance from the Office of the City Clerk, the Customer Experience Steering Committee endorsed the recommendation to discontinue the use of CRM for constituent activity and in early 2021 constituent records were removed from CRM.

In 2021 extensive research was conducted to determine an appropriate system to manage constituent records for the Councillor's offices. Councillor's Assistants were involved in reviewing various systems and a preferred vendor was identified and confirmed. This new system will be implemented and in place for Councillor's Assistants to manage constituent records starting in February 2022. Extensive privacy training has been provided to Councillor's Assistants, and the CX team is regularly engaged with the Office of the City Clerk for advice and guidance on how to achieve an effective distinction between records related to City operations and service delivery, vs. records related to constituency interests.

## **Website and Enterprise Architecture**

The CRM system provided by the vendor Rock Solid Technologies is a suite of custom trademarked software (OneView™, OneLink™ and Respond™) built on the Microsoft Dynamics platform. Through our agreement with Rock Solid Technologies, they host the solution through an agreement with Microsoft. This is not to be confused with the City's Enterprise Licensing Agreement with Microsoft which provides Office 365, other functionality such as TEAMS and could include Microsoft Dynamics.

The existing CRM solution does not meet all the business's needs. Upon consulting with Rock Solid Technologies on their roadmap to meet these needs, the vendor has requested that the City plan for an upgrade to Microsoft Dynamics V9 in 2022 as they are deprecating the current version with investment focused on the new version. The proposed upgrade is significant, and the timing and nature of the upgrade has provided the City an opportunity to review our current approach to CRM and customer facing technologies. The City is seeking to undertake a web enterprise architecture consulting review with a focus on the CRM direction, and the increasing technological complexity of CRM implementations and integrations while considering the optimization of the Microsoft tools (i.e. Microsoft Dynamics) and licenses, enterprise systems such as



AMANDA, Enterprise Resource Planning (ERP) and Enterprise Asset Management (EAMS), an increased reliance on multiple vendors, legacy technologies, and the objectives of the Web Modernization initiative.

As part of the City's long-term Digital Strategy, there will also be a separate initiative to define our future digital architecture addressing the items to be considered above in more depth and expanding to include identity, development platforms and standards of design and delivery for technology solutions. Funding for the CRM focused architecture consulting review has been requested through the Province of Ontario Audit and Accountability Fund (Intake 3). The Province will provide a decision on the request in January 2022. If approved, the consulting recommendations are expected to be finalized by August 2022.

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## Financial Matters:

### Total Financial Impact

The following table provides an overview of the estimated spending for the Customer Relationship Management (CA0059) project.

	Project Start to March 31, 2022	April 1, 2022 to December 31, 2023
<b>Available Budget</b>	<b>\$ 4,111,075</b>	<b>\$ 2,021,075</b>
Estimated Expenditures		
Human Resources	(1,277,000)	(636,000)
Implementation	(813,000)	(1,385,075)
Total Estimated Expenditures	(2,090,000)	(2,021,075)
<b>Budget Remaining</b>	<b>\$ 2,021,075</b>	<b>\$ -</b>

Note:

This assumes a phased transition of staff to operations in the 2023 and 2024 budgets.

### Source of Funding

The CRM project is funded by the Capital Budget. The Constituent Relations software will be funded through the ITS operating budget.

### **Other Resource Impacts**

As part of the project plan there is a Human Resources workload analysis prior to onboarding each department. The applicable FTE resources have been moved from onboarded departments to Service Burlington to handle additional workload.

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### **Climate Implications**

Not applicable

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### **Engagement Matters:**

The CX team engages on a regular basis through the CX working group that is comprised of colleagues in customer service manager/supervisor roles across the organization. In addition, there are regular meetings with departments who use the CRM system to discuss system improvements and user support.

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### **Conclusion:**

The CX program was established in late 2019 and since its inception has had significant achievements. A new vision was created and a strategy and implementation plan to support that vision. In addition, the Phase One implementation of the CRM is complete with By-law Enforcement, Licensing and Animal Control to be implemented in 2022. These advancements and the focus corporately on customer experience have enabled us to come closer to realizing our goal of One City, One Customer.

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Respectfully submitted,

Angela Morgan

Strategic Lead – Customer Experience

Extension 7374

### **Appendices:**

A. CRM Reports and Statistics

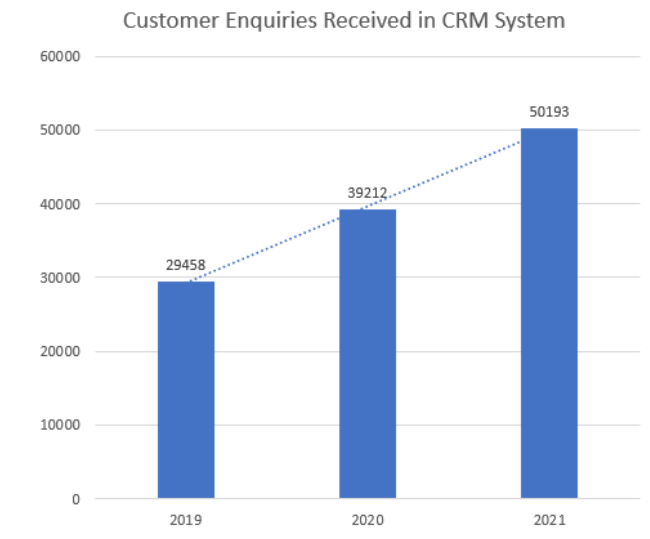
### **Report Approval:**

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.

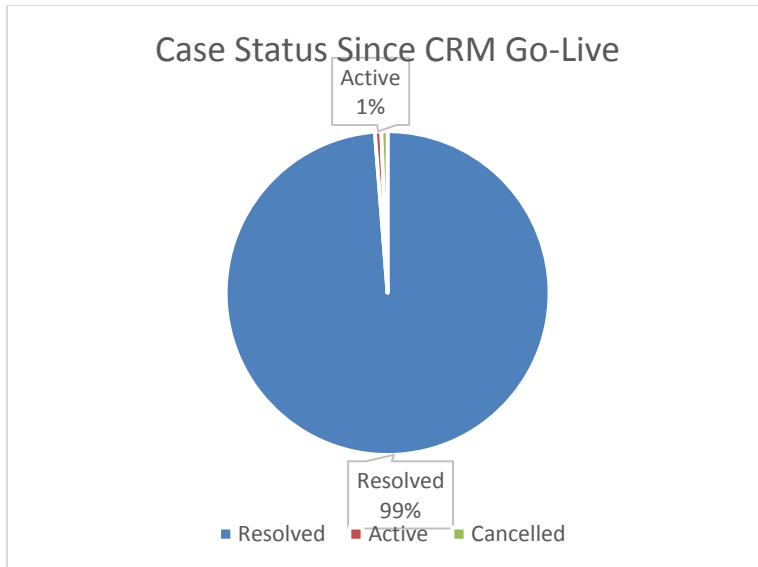
## **Appendix A – CRM Reports and Statistics**

### Part 1: Number of Cases Created in CRM (2019 – 2021)

Case volume in CRM has steadily increased since first implementation. Each year has surpassed the previous and created more new cases than before. As of January 6, 2022, there are over 118,000 unique customer requests recorded in the system, which are fully searchable with case history and can be reported on to show customer trends and interests.



98.7% of all cases created to date in CRM are closed. Closed status includes cases that needed to be sent to a non-CRM enabled department. Case closure does not mean that all of the work related to a customer request has also been completed. Work order management is recorded by different systems depending on the service that a customer has requested. The CRM system is not also a work order management system. There is no method in the CRM system to track the status of requests for services that are not yet using CRM. If a customer requests a service that is not yet using CRM, the request must be closed by the contact centre and then exits CRM system governance; it is forwarded via email to the non-CRM enabled department and then managed through email, telephone and in person communication with the customer.



As of January 6, 2022, there were 762 active customer requests in the system, and this active number fluctuates daily as new requests are created and existing ones are completed.

## Part 2: Cases Recorded for CRM-Enabled and Non-CRM Enabled Service Areas

As the City's customer contact centre, Service Burlington answers all calls to the City's main number 905-335-7777 and all messages to [city@burlington.ca](mailto:city@burlington.ca), and provides in person customer service at City Hall. While there are 13 other published phone numbers and various email addresses posted on [burlington.ca](http://burlington.ca) for services and departments, customers tend to contact Service Burlington through the City's principal contact information if they are not able to contact a department directly. 905-335-7777 and [city@burlington.ca](mailto:city@burlington.ca) are the most widely published and recognizable, simple ways to contact the City through Service Burlington.

Service Burlington receives and records customer requests for information or services relating to **all** City departments, not only those who have implemented CRM. If a customer request relates to a service that is enabled to use CRM, the entire enquiry from beginning to end is managed and recorded in the CRM. If a work order management system exists to help manage this work, CRM is integrated with that other system as in the example of Tree Plotter.

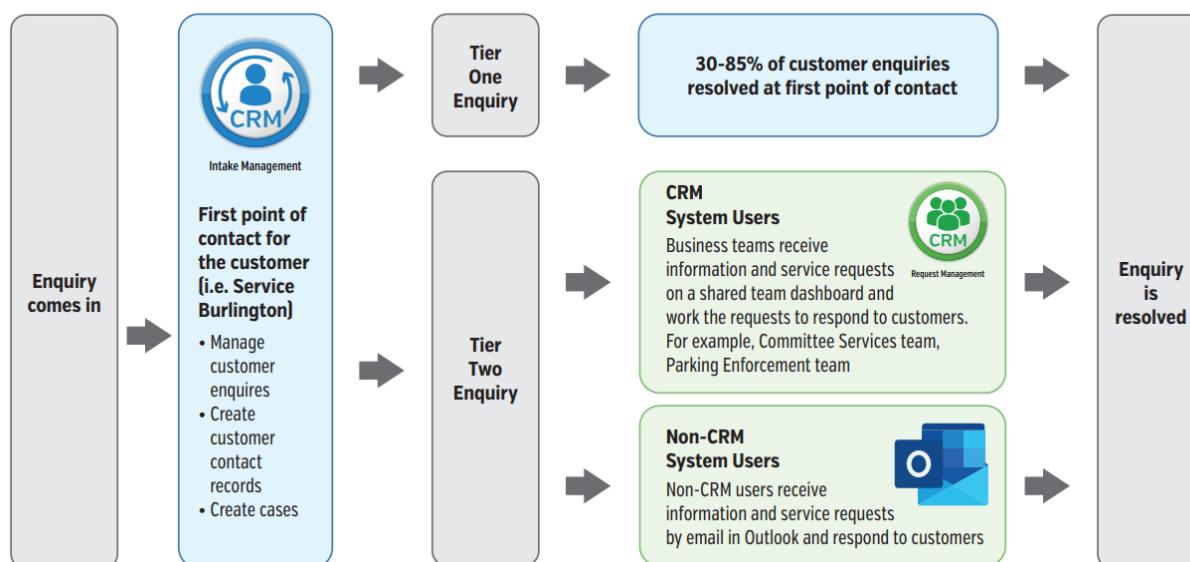
If a customer requests relates to a service that is **not** enabled to use CRM, the case cannot be updated and worked through the CRM system by the department. The only possible action is for Service Burlington to log the request and details, close the request and send it to the appropriate department for response through email, telephone or in-person contact with the customer. Knowledge Base Articles do exist for all types of City services, including CRM-enabled and non-CRM enabled services. KBAs are always

shorter and smaller for non-CRM-enabled services. The CRM system currently includes workflows for 217 Information Request Types and 81 Service Request Types. The Knowledge Base is constantly growing in depth, breadth and complexity as the CX team and Service Burlington works closer with all City services.

In 2021, 36% of the 56,732 total enquiries received by Service Burlington related to non-CRM enabled services. These were requests for services that are not yet able to use CRM, so while the enquiries could be recorded by the contact centre the expert staff within the related department then had to manage all customer response through email, telephone and in person contact without the benefit of a consolidated, structured data system to assist in consistent customer response and capture history.

The image below illustrates the difference between how a CRM-enabled and non-CRM enabled customer request receives response:

#### CRM: Sample of a customer enquiry from receipt to resolution



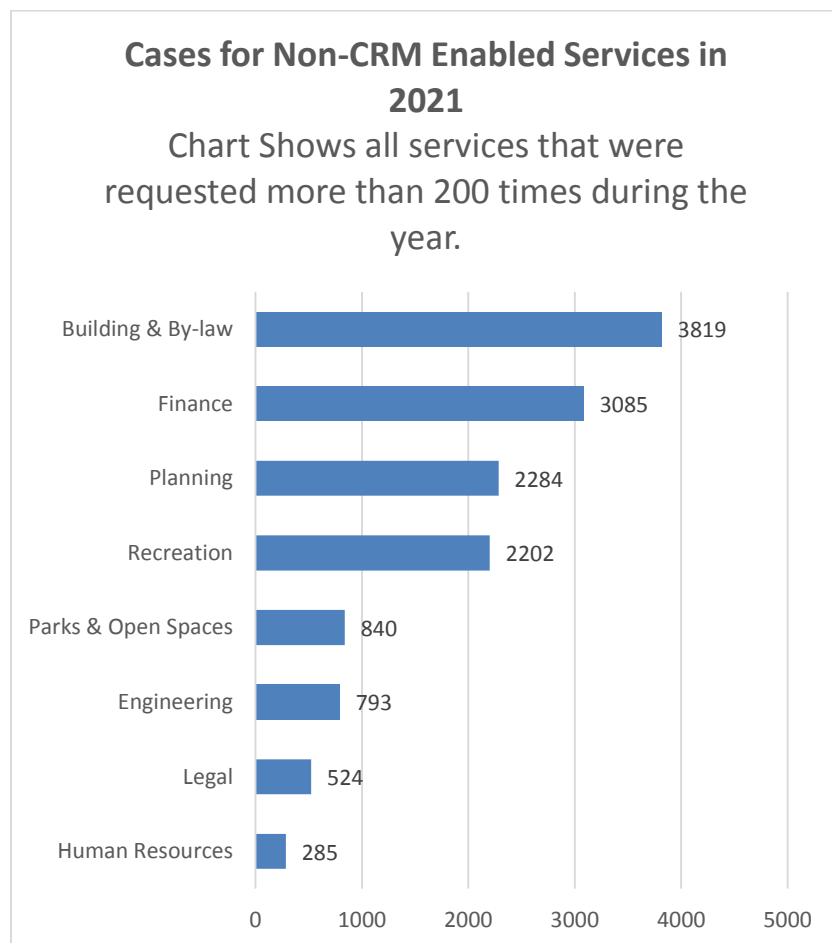
CRM-Enabled Departments use the CRM from start to finish of a customer's enquiry. The customer request starts and ends in CRM. The full history is captured in CRM completely, including notes and emails.

Departments that are not yet using CRM receive a case notification from Service Burlington via CRM and then need to manage customer response and resolution through phone, meetings or emails in Outlook. Only the beginning of a customer's journey is captured in CRM. The full history after a request is sent to Department resides across email, shared drive and unstructured notes.

CX is striving to reduce the percentage of customer enquiries to Service Burlington that cannot be served entirely through the CRM system, by enabling more departments to use CRM. CX is constantly increasing the volume of information in the City-wide

knowledge base as well. And as Service Burlington is empowered with effective KBAs, the contact centre is enabled to answer a greater portion of customer enquiries immediately at the 'Tier 1' level without having to send those enquiries further in to the organization. In 2021, Service Burlington was able to fully resolve 49% of all customer enquiries directly at the first point of contact, thanks to the Knowledge Base Articles available in CRM and the team's expertise on a broad range of City services.

The chart below illustrates the top 8 customer request types by volume for City services that are not yet enabled to use CRM:



The two charts below show Service Burlington and the CX team's progress on increasing CRM-enablement across the organization. Since 2019, the overall percentage of total customer enquiries that **can** enjoy a full response through CRM, from start to finish, has increased and is expected to continue increasing in 2022 when By-law, Licensing and Animal Control are added to the CRM system.

The second chart represents similar growth but by volume of actual customer request numbers, with a split in colour between requests for non-CRM enabled services in orange, versus CRM-enabled services in blue.

This is significant for customers because having a request managed through the CRM system provides the following benefits:

- All information related to the customer's request is available in one single, structured system that is accessible to multiple staff. Meaning that when the customer calls for updates, more City staff can answer their questions directly without having to wait for or dig through unique information with one individual
- All details of a customer's original request are captured together with history that can also be reviewed at any time in chronological order, telling the full story end to end of a customer's needs
- Full customer contact history is available, including information on the type and volume of requests a customer has submitted; so if a customer is asking about previous requests, all are easily available to view in relation to that customer
- Customer receives a unique case number for easy and quick reference in future when contacting the City

Customers who request services that are not yet enabled with CRM do not get to enjoy these enhancements. They are left to navigate contact with the City through individual email addresses, group email inboxes, telephone calls or attempt to book in person or virtual meetings with staff in an unstructured way, outside of any overall system.

