



# Customer Experience Update

Corporate Services, Strategy, Risk and Accountability Committee  
February 2, 2022



# Report Summary

## **Providing an update on city-wide customer experience (CX) optimization and CRM system operationalization**

- ♥ CX Vision, Strategy and Implementation Plan progress
- ♥ CRM and Digital Transformation
- ♥ CRM Capital Budget information
- ♥ Benefits achieved
- ♥ Challenges and changes
- ♥ Designing and Evolving Our Organization
- ♥ Constituent Relations
- ♥ Digital CX on burlington.ca and the CRM portal

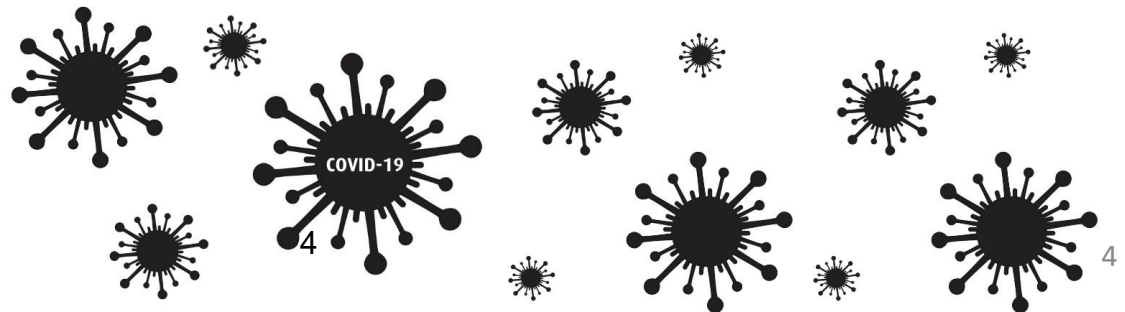
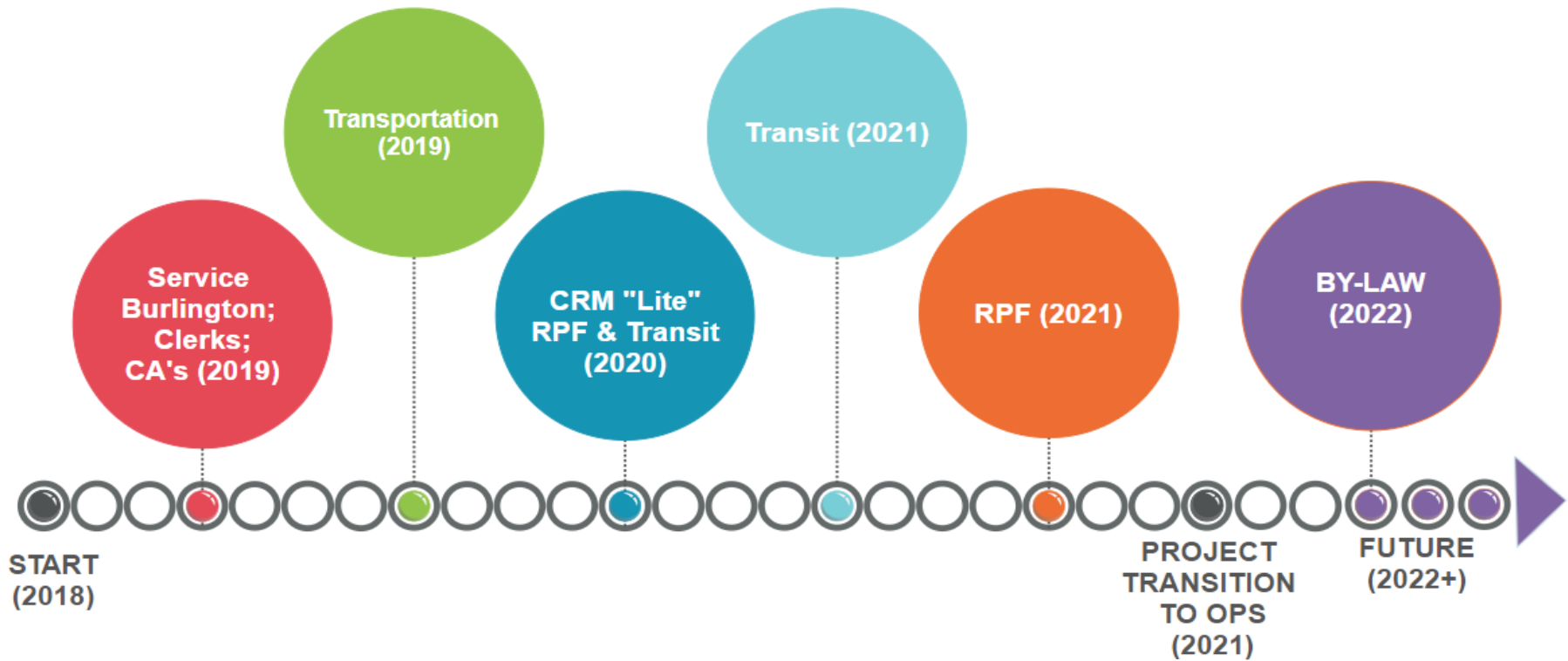


# Presentation Goals

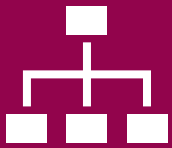
- ♥ Demonstrate how CRM has improved the customer experience
- ♥ Show how CRM has enhanced the employee experience
- ♥ Share real world examples of CX optimization
- ♥ Point to where we are headed in future



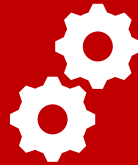
# CRM System Evolution and Future



# CX Milestones Since 2019



Established CX Department



Implemented CRM



Service Burlington as  
Contact Centre



Including Councillor's  
Assistants in CX



Constituent Records System



Data Integration with CRM



Customer Service Standards



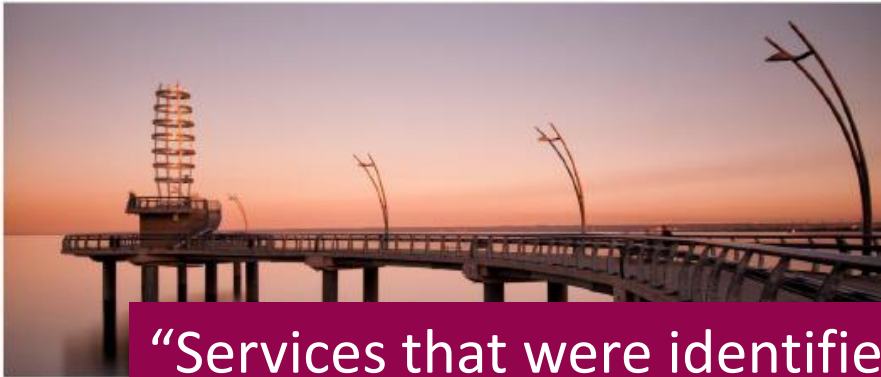
CX Working Group and  
Executive Advisory



CX Strategy &  
Implementation Plan



# The City of Burlington Community Survey 2021



“Services that were identified as strengths of the City of Burlington were Service Burlington, [and] the City’s customer service system...”



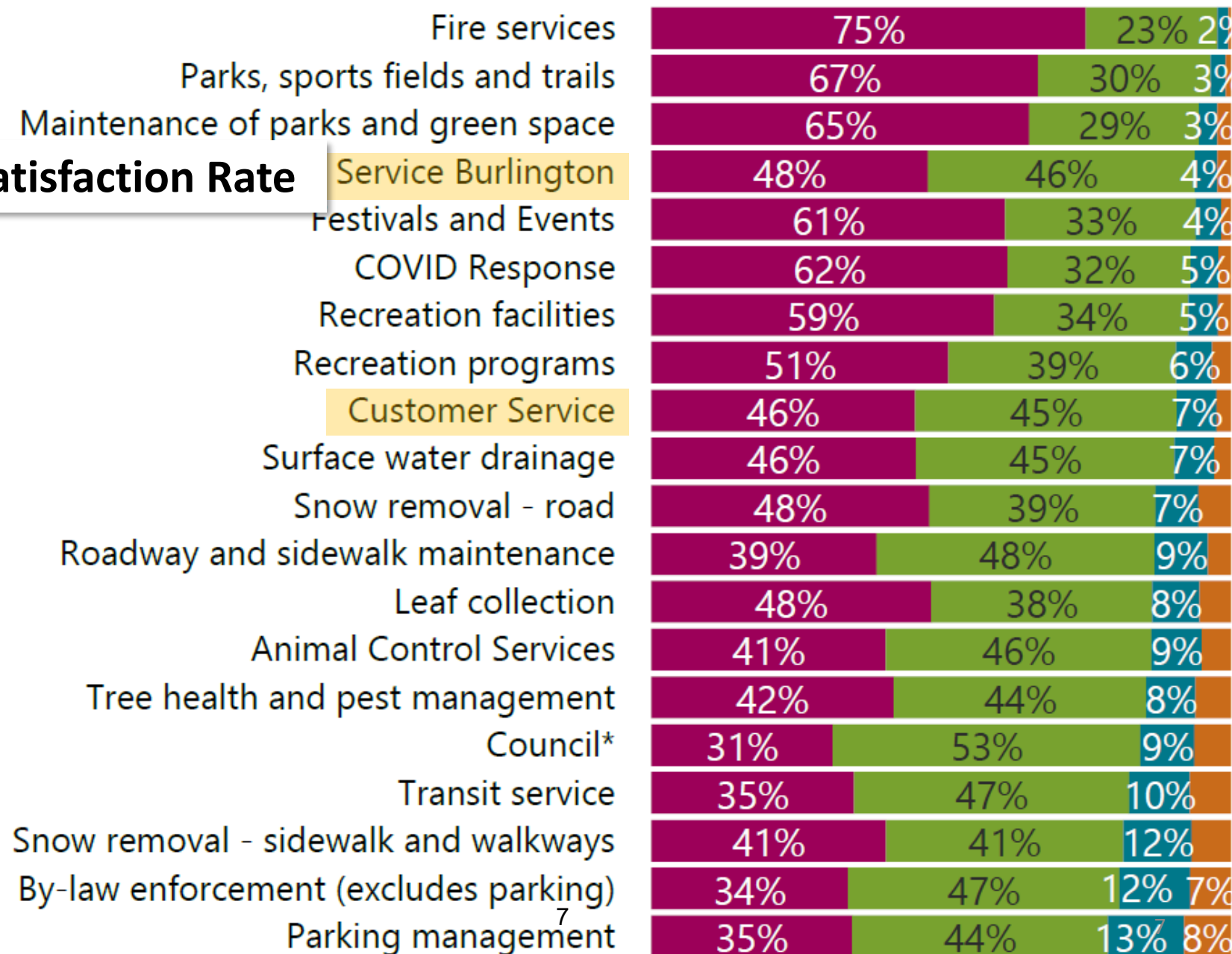
Final Report - Nov 2021





Figure 9: Level of satisfaction with various city services (n=755)

**94% Satisfaction Rate**

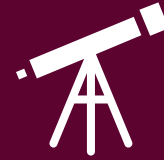


# Was Anyone Better Off?





# Contacting the City



What's Next?  
More questions answered at  
first point of contact

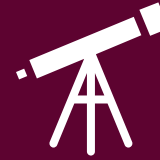
- 905-335-7777
- [city@burlington.ca](mailto:city@burlington.ca)
- One City, One Customer
- Connect with contact centre
- Request is recorded in CRM
- Get an answer to your enquiry
- Easy reference for updates from history
- Be recognized and understood



CUSTOMER  
EXPERIENCE



# Customer Contact



What's Next?  
Growing the Knowledge Base



EMPLOYEE  
EXPERIENCE

- Member of true contact centre team
- Access to Knowledge Base (250+ KBAs)
- Access to City applications and web
- CRM Announcements and info share
- Empowered equally for phone, email and in person
- Able to provide more answers and updates
- Working faster, more efficiently
- Working flexibly and remote when needed
- Positive morale and dynamic team
- Professional development opportunities



# Heard by Service Burlington

“Thanks so much for taking my call”

“I’m so glad I got a live person”

“Thanks for the update”

# Empowering Service Burlington

Unified Serv

New Sessi

New Session X

Name:

E-mail:

Phone:

CALL SCRIPT

Respond Call S

1. Thank you for calling the City of Burlington, how may I help you?

- Enter any information in the notes section if needed on the customer's request.

2. I am entering your request. If you like, I can enter your contact information.

- Please proceed to gather customer information and identify your customer. Contact information that is of interest is phone number, email, full name and address:

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tacts

+

+

+

14

Page 1

Owner

Transit Custo...

1,405

Service Burli...

1,010

Roads and Win...

753

Parking Custo...

723

Clare Cameron

A note was created for the Request Corporate Co On Clare Cameron's wall 1/10/2022 11:18 AM

Clare Cameron

A note was created for the Request Road Debris On Clare Cameron's wall 1/10/2022 11:18 AM

Search Results

snow

X

Title

As per a follow up on snow banks

Follow up on snow removal along curb

FW: COB - Request: (RPF) Snow removal on stre

FW: COB - Request: (RPF) Snow removal on stre

FW: COB - Request: Snow removal on streets anc

Knowledge Article Search X

winter

X

All published articles

13 results found

Relevance

Winter Maintenance

Roads, Parks and ForestryRoads and Sidewalks Winter MaintenanceRPF-029 - 19-Jan -2022DescriptionThe City

Modified on 1/19/2022 | 122

Winter Maintenance D...

Roads, Parks and ForestryBusiness ServicesWinter Maintenance Damage Reporting RPF-064 - 15-Dec-

Modified on 12/21/2021 | 27

Loose Leaf Pickup Prog...

Roads, Parks and ForestryRoads and Sidewalks Loose Leaf Pickup ProgramRPF-020 - 15-Feb -2021DescriptionThe

Modified on 11/5/2021 | 372

Enter notes here...

12

12

Search for records

ontario inc



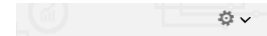
CASE

# Information: Transit Schedules and...

Owner\* Case Number Status Business Unit  
Transit Custo CAS-123961-D5M9Y0 Problem Solved Transit

## General Information

Case Number CAS-123961-D5M9Y0  
Reported Date 1/26/2022 12:13 PM  
Case Title Information: Transit Schedules and Trip Planning  
Reported By\* Anonymous Contact  
Affected Contact Anonymous Contact  
Origin\* Phone  
Classification --  
Request Type --  
Priority Code Normal  
Language Preference English  
Parent Case --  
Details of Request (Note: T\* The citizen was informed.



Search



Relevance

Maintenance

and Forestry Roads and Sidewalks Winter  
RPF-029 - 19-Jan -2022 Description The City  
1/19/2022 | 122

Maintenance D...

and Forestry Business Services Winter  
Damage Reporting RPF-064 - 15-Dec-  
12/21/2021 | 27

Pickup Prog...

and Forestry Roads and Sidewalks Loose Leaf  
ram RPF-020 - 15-Feb -2021 Description The  
11/5/2021 | 372

Page 2

Auto posts User posts

for the Request Corporate Co  
wall

Owner

Roads and Win...

753

Parking Custo...

723

13

Clare Cameron

A note was created for the Request Road Debris

On Clare Cameron's wall

12/3/2021 2:38 PM

13

# Empowering Service Burlington

Unified Service Desk

New Session x

Name:  
E-mail:  
Phone:

CALL SCRIPT  
Respond Call Script

1. Thank you for calling the City of Burlington, <Your Name> speaking, how may I help you?  
- Enter any information in the notes section if needed on the customer's request.

2. I am entering your request. If you like, I can enter your contact information.  
- Please proceed to gather customer information and identify your customer. Contact information that is of interest is phone number, email, full name and address:  
a. If the customer wishes to stay anonymous, proceed to click on the anonymous contact in the menu below.  
b. If the customer is willing to give the contact information, search for the customer first. If the customer exists, then click on the customer record to load the customer profile.  
c. If the customer does not exist, please proceed to create a new customer record.  
d. Review and update the customer data with the provided information then save the customer profile if it is a new customer, or information has been updated.

3. Please wait while I work on your request.  
- Proceed to search the knowledge base for the request.

Search for a contact  
Create a new contact  
Use anonymous contact  
Complete Call  
Cancel Call

**Search Results**

snow

Title ↑

- As per a follow up on snow banks
- Follow up on snow removal along curb
- FW: COB - Request: (RPF) Snow removal on street
- FW: COB - Request: (RPF) Snow removal on street
- Fw: COB - Request: Snow removal on streets and
- FW: Moving snow at Mainway arena

Knowledge Article Search x

winter

All published articles

13 results found Relevance

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Enter notes here...

Owner

Transit Custo...	1,405
Service Burli...	1,010
Roads and Win...	753
Parking Custo...	723

All records | All posts | Auto posts | User posts

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Search for a contact  
Create a new contact  
Use anonymous contact  
Complete Call  
Cancel Call

Home

Back

! Warning

CITY OF Burlington

I Need

Prop Ass

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Order

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Knowledge Article Search X

winter

All published articles

13 results found

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Modified on 11/5/2021 | 372

Enter notes here...

# Announcements Window

Dynamics 365 Service Dashboards

SAVE AS NEW SET AS DEFAULT REFRESH ALL ADVANCED FIND

Customer Service Operations Bac...

My Cases - Active

Search for records

Created On	Origin	Case Number...	OneView Id	Case Title
No Case records found.				

Active Contacts

Search for records

Full Name	Customer Type	Email	Cre
1 Hair Salon roya.ensandoost@yahoo.com	Resident	roya.ensandoost@ya...	
10491098 Canada Inc Akram Elmansi	Resident	rootexauto@gmail.c...	
1137662 Ontario Inc. Raj Sahney	Business	rajandneeta@hotma...	

**1/5/2022 Park Washrooms**

The following park washrooms will be open 7 days a week, from 8 a.m. to 8p.m. through the winter season. Please note that washroom opening times may be delayed during winter weather:

- Beachway Park – North
- Central Park
- Maple Park
- Hidden Valley Park – Upper
- LaSalle Park – Upper
- Lowville Park – South (Please note: this location will be closing 3pm on weekdays and 5pm on weekends)
- Paletta Park

This information is in the FAQ section of the COVID-19 KBA.

red Queue ↑ Type

1/18/2022 9:13 AM	Email
1/20/2022 1:35 PM	Email
1/20/2022 5:31 PM	Email
1/25/2022 12:49 PM	Email
1/25/2022 3:44 PM	Email
1/25/2022 4:51 PM	Email
1/26/2022 8:13 AM	Email
1/26/2022 8:19 AM	Email

Page 1



Pearse, Elizabeth 12/13/2021 7:56 AM



Good morning team, we are expecting a high volume of calls today for trees and limbs that likely came down over the weekend. Please ensure your cases capture all of the details RPF will need to manage their service requests. Jackie and Daytona will be on email today to help us get through the higher volume. See you at City Hall. 😊 We've got this!

# Microsoft Teams Chat Group

are from Answer Plus over the weekend or new today. He's out in the field working with the crews and is getting regular updates for high priority issues. If you receive something you feel is extreme, please reach out to me first.



Pearse, Elizabeth 12/13/2021 8:59 AM



Forestry staff is prioritizing requests as quickly as possible and assessing each situation for severity. Crews have been working all weekend and we expect everything should be cleaned up in another day or two.

↩ Reply



Lacey, Cathi 12/13/2021 11:43 AM



If someone calls trying to pay their ticket for an unplated vehicle, tell them to enter VINUMBER as the plate along with the penalty notice number and the system will find the ticket

↩ Reply

Tuesday, December 14, 2021



Pearse, Elizabeth 12/14/2021 3:35 PM Edited



Today I printed out copies of our RPF SME list. Please ensure you take a printout home with you to add to your Business Continuity Packages. If CRM was to go down you would still have access to these important numbers 😊 I would also recommend printing out and taking home our staff list. Thanks everyone!

↩ Reply

Monday, December 20, 2021



Pearse, Elizabeth 12/20/2021 1:42 PM



**IMPORTANT!**

Hello Team: Mara has just informed me that Engineering has a planned 5 to 10 second power outage happening at City Hall between 2 and 2:30 today. Those working from home will need to ensure they are logged in to phones while staff in the building prepare for this outage. We may experience issues restarting computers so ensure that everything you are working on is saved before 2pm.

↩ Reply



CHOOSE



EMAIL A LINK



BULK REMOVE



RUN REPORT



EXPORT TO EXCEL

## All New Email Items ▾

Queue:

Service Burlingt ▾

✓	Title	Entered Queue ↑	Type	Queue
✉	Hello from Humber's Faculty of Applied Sciences & Techn...	1/25/2022 4:51 PM	Email	Service Burlington
✉	Parking in front of 3298 Star Lane	1/26/2022 8:13 AM	Email	Service Burlington
✉	As per a follow up on snow banks	1/26/2022 8:28 AM	Email	Service Burlington
✉	Follow up on snow removal along curb	1/26/2022 8:33 AM	Email	Service Burlington
✉	age range unclear for course #105881	1/26/2022 9:59 AM	Email	Service Burlington
✉	SNOW REMOVAL	1/26/2022 10:09 AM	Email	Service Burlington
✉	house blueprint	1/26/2022 10:45 AM	Email	Service Burlington

## Date Range

Jan 17, 2022 - Jan 23, 2022

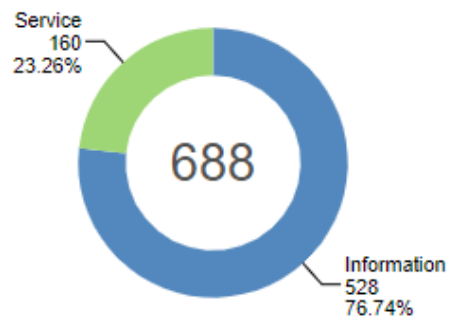
## Owning Department

Roads, Parks and Forestry (RPF)

## Request Origin

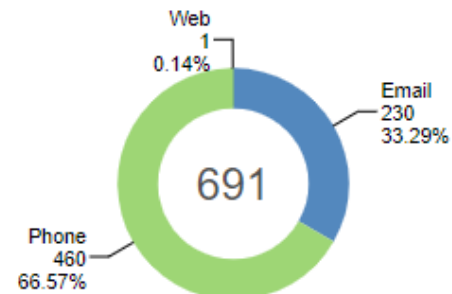
4 of 7

## Request Count By Classification



Request Count

## Case Mix By Origin

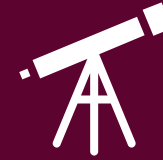


Case Count

## Top 10 Requests By Type

Detail Name	Winter Maintenance
	Winter Maintenance Damage Reporting
	Public Tree Ownership, Inspections & Maintena...
	Tree Permit Application Process
	Public Parks and Open Spaces Maintenance
	Catch Basin and Maintenance Hole repair
	Windrow Snow Clearing Program

# CRM-Enabled Service



What's Next?  
Enhancing CRM, refining  
requests and KBAs



EMPLOYEE  
EXPERIENCE

- Service Burlington provides first point of contact
- View all new, current and previous requests in CRM
- View dashboard with real time request updates
- Access quick reporting on request types and volume
- View customer contact records
- View all available history
- Add updates and case notes
- Email customer and staff from within CRM
- Governed by team security model
- Help Desk assistance from CX team







Use of CRM freed up staff resources so Parking Services could concentrate on COVID-19 pandemic response and rapidly changing regulations.

After the pandemic, staff resources will be able to work on outstanding projects and service innovation.



# January 17 Snow Event

First to benefit from CRM and Contact Centre:

613 Customer Enquiries received, 553 Resolved by Service Burlington  
(90.2%)

No Auto Attendant Required during Business Hours; the main City  
phone line never had to use “due to high call volume...”

Daily contact between Service Burlington and RPF Operations Centre  
two ways, sharing positive feedback from customers together with  
technical info. “GREAT JOB on snow removal!”

# Purchasing a Parking Permit

A map of Burlington, Ontario, showing various streets and parking areas. The map includes labels for streets such as HURD AVE, EMERALD ST, DOLINE ST, ONTARIO ST, BELLVIEW ST, and LAKESHORE RD. A legend in the top left corner identifies green 'P' icons as 'Municipal Parking Lots' and orange rectangles as 'Private Lots (Rules Vary)'. A blue box on the right side of the map states 'Parking available after 6 p.m., Sat., Sun., and Holidays'. The map also shows the shoreline of Lake Ontario at the bottom.

 Municipal Parking Lots  
 Private Lots (Rules Vary)

Identify and view history of customer contact, and understand immediately progress of request so far

Customer contact information available in CRM for direct follow up and telephone conversation, confirming technical difficulty receiving email

Educating the customer who was not familiar with downtown Burlington on landmarks, assisting with accessibility needs and connecting directly with Parking Customer Service through CRM

# Upcoming: Election 2022

First election to benefit from CRM and opportunity to use Service Burlington for first point of contact

New Knowledge Base Articles will be created, now in development with Clerks

New reporting opportunities will be available during and after election to understand volume, timing and trends, types of customer requests and questions



# How are we advancing on trends?

## Service Goals and Objectives

Working with HR for CX Competencies recognized in Job Descriptions and JIQ process

Inclusion now part of Customer Service Standards; partnered with Communications and Newcomers Outreach group

Working with IT Services and Communications to enhance current web portal and architecture for future ID management

Foundation is being built with CRM system data; Voice of the Customer initiatives will assist

Remote work now part of Customer Service Standards

### Opp

- Real mastering 6 competencies: Research, Prioritization, Data, Management, Communication, and Collaboration
- A co to

### Industry Trends

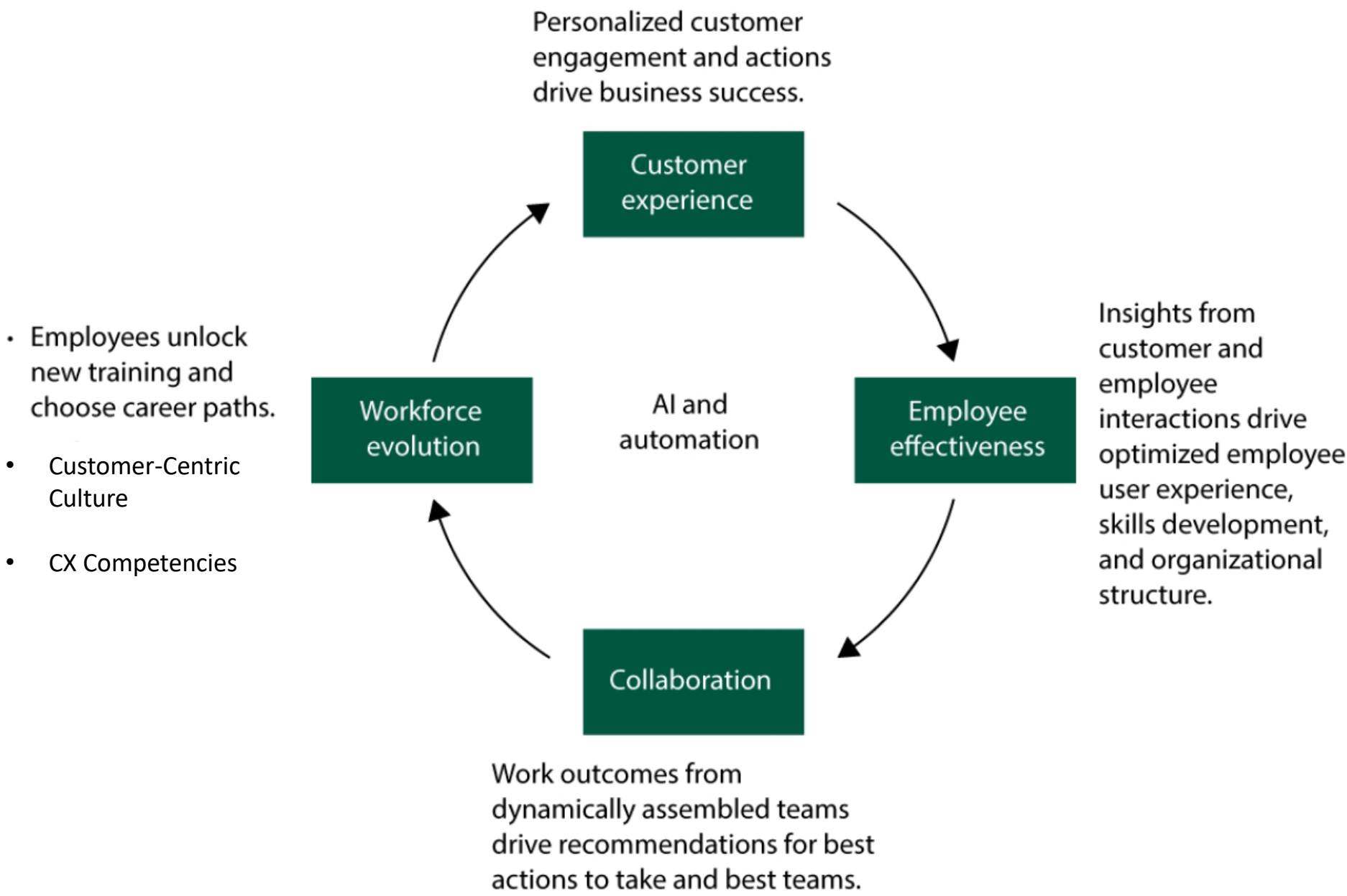
- Digital Citizen: Improving end to end service delivery via a unique digital identity
- Anticipatory Government: Preempting problems through predictive analytics
- AI augmented government: Climbing the AI maturity curve
- New internal communications tools/tactics for a hybrid workforce

# The future of CRM & CX

- CRM as a City-wide platform and information asset, not just for customer service
- Increasing CRM metrics, reporting and analysis
- CRM will support the end-to-end customer journey – which spans digital and human-assisted engagement
- Empower users with knowledge and information
- Spark new communications from CRM data trends
- AI and automation







# Future of CRM at the City

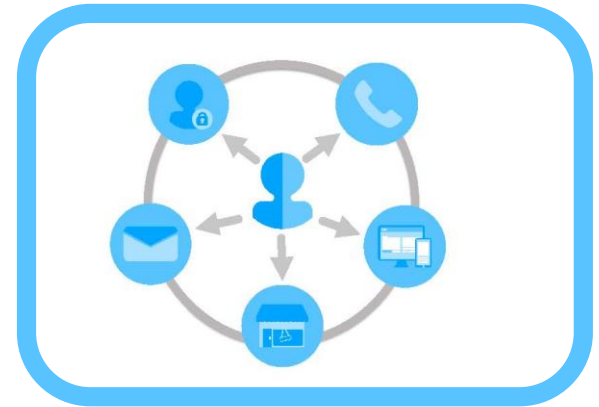
## One Customer, One City



CRM Rollouts within  
CX Operations



CRM and Enterprise  
Architecture



Customer Portal,  
Mobile Friendly and  
Live Chat



Thank you so much to the City Street Maintenance Department for replacing the streetlight on Hemmingway Dr. this week. The job was quickly attended to making that section of road safer and friendlier for all in the neighborhood. You have given people who arrive home after 5:30 pm in the dark an opportunity still go for a relaxing walk.

Caller wanted to give shout out "good for you Burlington" for doing a great job clearing the roads during the snow storm.

Caller complimenting RPF Winter Maintenance on a job well done on the path along the lake, into the forest and the parking lot. Caller was very pleased.



This morning, we had the pleasure of watching City staff collect the leaves from the Maplehill Drive/Willow Lane/Oakhurst Road neighborhood. Please pass on our Thank You to the entire Team. Their service cleared the streets quickly and efficiently. With the drivers of various equipment and those walking with rakes working together, it was like watching a well-choreographed synchronized exercise.

Driftwood Park - Caller reporting that the workers working at this park are doing a great job. Always hard at work.



I go to Burlington Beach to swim every single day at 6:30am. My compliment goes to all the team who keep the beach impeccable but the one that has my full recognition and admiration is the man that cleans and rakes the beach with sand cleaner truck. He goes beyond to keep the beach clean. He has always taken care of us swimmers by cleaning the “guck” from the beach. We have seen him maneuvering the “sand Zamboni” to clean it. It is early and sometimes we are 2 swimmers. Amazing!!

Implementing the CRM has allowed us to better serve and respond to our customers. We have also strengthened our connection to Service Burlington and our ability to provide service with a heart. A win all around. (Transit)



I wanted to reach out and say that I really enjoyed your presentation yesterday. The quality and creativity of your slideshow was exceptionally clever and kept me engaged. Bravo! (RPF)

Thanks for all of your help with navigating this process. It's been a real pleasure to work with you as CRM has developed. (RPF)

I can't thank you and your amazing team enough for the great support during leaves. Very few things came through to me and the things that did needed to. I appreciate this as it allowed me and staff to do our job efficiently. I think the open lines of communication really helped and I look forward to working with you all through the snow! (RPF)





“Kudos to all the road crews on their work during last Monday's snow storm. Roads were cleared efficiently and well. Our street, Bader Crescent, was plowed several times by the end of the day and I can't imagine a better level of service. Keep it up guys! You have my deepest appreciation.”



what our customers say



# Questions

## Customer Experience Update

February 3, 2022

