



**SUBJECT:** Web Architecture Review (Provincially Funded)  
**TO:** Community Planning, Regulation & Mobility Cttee.  
**FROM:** Customer Experience

Report Number: CX-01-23

Wards Affected: All

File Numbers: 200-06

Date to Committee: January 10, 2023

Date to Council: January 24, 2023

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### **Recommendation:**

Receive and file customer experience report CX-01-23 transmitting the Enterprise Web Architecture and Modernization Review report and recommendations from KPMG completed through the Audit and Accountability Fund.

### **PURPOSE:**

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

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

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### **Background and Discussion:**

On October 19, 2021 Council approved the submission of an Expression of Interest to the Ministry of Municipal Affairs and Housing - Audit and Accountability Fund Intake 3 for an Enterprise Web Architecture and Modernization Review. The Ministry approved the submission and the City of Burlington entered into an Agreement with the Ministry in February 2022.

Under this agreement the Ministry agreed to provide up to \$152,640 for an independent third party review of the City's current web architecture to identify efficiencies and opportunities to modernize and improve the online customer experience. The objectives of the review were as follows:

- An assessment of existing web architecture and current state of online services, customer applications, databases, platforms, and integrations;
- Stakeholder engagement and feedback;
- Recommendations for the development of enterprise and web architecture that identifies efficiencies and results in an improved customer and employee experience;
- Recommendations for improving, upgrading or replacement of the existing customer relationship management software;
- An implementation roadmap which prioritizes and aligns related digital service enablement projects to gain high impact improvements over the next 3-5 years;
- A governance model to address how the City identifies, prioritizes, and manages web-related technology projects, risks and opportunities; and
- Actionable items with estimated timelines and budgetary requirements.

The Ministry requires that the independent third-party reviewer compile the findings and recommendations in an Independent Third-Party Reviewer's Report. The City is required to submit the report to the Province and publish the report on the City's publicly accessible website by February 1, 2023.

The City entered into an Agreement with KPMG LLP (KPMG S.R.I.) in May 2022 to complete the Enterprise Web Architecture Review in accordance with the Ministry's Audit and Accountability Fund Intake 3 requirements. The consultation activities were completed between May and November 2022.

An interim status report was provided to the Ministry in May 2022 to confirm progress on the initiative.

## **Strategy/process**

### Purpose

The Enterprise Web Architecture Review was required to address the growing use of the CRM and its limitations, the number of systems that contribute to a disparate online experience for the City's customers, and the desire to bridge customer data across all channels, systems and services.

The Enterprise Web Architecture & Modernization Review report prepared by KPMG outlines opportunities and recommendations on modernizing the City of Burlington's current web architecture to:

1. Transform through a customer-centric approach and enhance overall customer experience (CX) and employee experience (EX);
2. Enhance internal operations, service efficiencies and effectiveness;
3. Reduce and/or avoid cost through resource utilization and automation.

The report compiles the customer-facing applications and technology architecture from current documentation, preliminary findings and observations gathered during workshops. It also provides an evaluation of the current CRM platform options (i.e., upgrading, augmenting, or replacing the current CRM) so that the City can decide which option is most appropriate.

The report provides a conceptual future state web architecture and focuses on best practices to enhance the overall customer experience for residents and visitors. Furthermore, several architecture themes and principles were derived and target state opportunities are identified and associated with efficiencies. These efficiencies could be gained from proposed initiatives, improvement metrics, dependencies, cost impacts and requirements. Moreover, each opportunity is associated with a proposed initiative(s) to achieve the target state. A proposed three-year roadmap shows a recommended high-level implementation plan.

The report identifies that in order to achieve the objectives for a future state web architecture, incremental improvements will be required to address:

- The use of the existing CRM and Microsoft Dynamics platform, hosting model, and required upgrade to version 9;
- A unified approach to customer facing technologies to optimize development resources and skills;
- Implementation of a Customer Identity and Access Management model as the foundation for an improved and secure identification and login experience across service areas and applications;
- Implementation of Master Data Management strategy and principles to unify, govern and maintain quality customer data in a manner that is system agnostic;
- Improvements in the use of integration tools, standards and data access across applications;
- Improvements in system driven workflows over manual workflows;
- Increased availability of data to Service Burlington to service customers more effectively and improve service level response times;
- Improved business intelligence analytics to unlock greater insights such as sentiment analysis.

### Related Initiatives

The City approved three initiatives under separate funding agreements with the Province of Ontario:

- 1) Enterprise Web Architecture & Modernization Review

- 2) Land Management Database Platform Review
- 3) Streamline Development Application Fund

The Land Management Database Platform Review is delivering a comprehensive workplan to bring information technology related cost savings and efficiencies to the development services approvals , permitting services, licensing services, other application services and the management of the platform services. There is a significant online customer service delivery component to the workplan. The Enterprise Web Architecture and Modernization Review is delivering recommendations for a high-level architecture to align online customer service delivery across City services and systems. The Streamline Development Approval Initiative Fund (SDAF) project is a one-time project delivering specific improvements to the low density residential development approval service.

All three initiatives share the objective of finding efficiencies and cost savings in the provision of city services to deliver an enhanced customer experience. Each focuses on business outcomes which include the customer online experience and enabling technologies. Therefore, the recommendations of each report will be considered together in order to align and prioritize the desired outcomes, and ensure effective planning and utilization of resources and technology.

### Next Steps

A cross functional team led by Customer Experience, IT Services and Corporate Communications & Engagement is evaluating the options in the Enterprise Web Architecture report and will provide an update to Council in early Q2 2023. An analysis of the next steps will consider the KPMG findings with respect to web architecture and CRM in the context of:

- viability and feasibility including cost, resource and vendor contract impacts;
  - a broader enterprise architecture model;
  - desired business outcomes;
  - customer and employee experience; and
  - the prioritization of separate and related initiatives occurring across the corporation.
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## **Financial Matters:**

### **Total Financial Impact**

The total cost of the contracted engagement with the third party vendor KPMG LLP excluding taxes is \$140,000.

### **Source of Funding**

The Ministry will reimburse payments made by the City to the third-party vendor up to the maximum funding allowance of \$152,640 provided that all requirements of the Audit and Accountability Fund Intake 3 requirements have been met.

### **Other Resource Impacts**

Given the complexity of the changes recommended within the report further analysis is required to determine the impact to staff resources, technology and initiatives currently underway at the City.

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## **Climate Implications**

Not applicable.

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## **Engagement Matters:**

The Web Architecture Review was led by a core team comprised of members from IT Services, Corporate Communications and Engagement, and Customer Experience. A number of City staff were consulted during the course of this review. In total, 26 sessions were held to gather feedback from key stakeholders of online services, the Customer Experience Advisory Team, CRM users and implementation teams, and other technical and business application owners. A survey of CRM users was completed to gauge satisfaction with the existing CRM product. These sessions provided insight to the current state, and to the development of a proposed future state roadmap.

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## **Conclusion:**

The KPMG Enterprise Web Architecture Review has provided several options and recommendations for the City to consider in order to improve the online customer experience and achieve efficiencies with technology and resources. The report will be submitted to the Ministry of Municipal Affairs and Housing to meet the requirements of

the Audit & Accountability Fund. An update will be provided to Council in Q2 2023 in response to the recommendations within the report.

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Respectfully submitted,

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## **Appendices:**

A. KPMG Enterprise Web Architecture & Modernization Review

## **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.