City of Markham

Contact Centre Review

Final Report – October 7, 2024

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Mayor and Members of Council,

I am pleased to present the Contact Centre Review report ("report") of the Auditor General for the City of Markham. To ensure the results of our review are balanced, we have provided in this report a summary of identified strengths, as well as observations and recommendations for improvement.

The report was discussed with the City of Markham's management and executive leadership team, who have reviewed the report and provided their responses within. This report is provided to you for information and adoption of the City of Markham's proposed action plans.

In order to conduct the analysis, MNP assessed the Contact Centre's People, Process, and Technology. This type of framework has been successfully used to assess how these three elements work together to enable organizational success and outcomes. The review was conducted between July and August 2023, prior to the launch of the Xplor system.

Implementing improvements across People, Process, and Technology will assist the Contact Centre in addressing many challenges in capacity planning, improving service levels, and driving productivity improvements. Adoption of the recommendations and improvement opportunities can enhance the Control Centre's strong service levels and drive greater value in the scalability of existing resources.

Sincerely,

Geoff Rodrigues, CPA, CA, CIA, CRMA, ORMP

Auditor General, City of Markham

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BACKGROUND

The City of Markham ("Markham"), with a population of approximately 357,000, offers a variety of services to its residents, including support programs, infrastructure, recreation, and cultural facilities. Markham is committed to enhancing transparency, efficiency, and effectiveness for the benefit of its community. Established in 2003, Markham's Contact Centre ("Centre") facilitates direct communication between the local government and the community, improving transparency, accessibility, and responsiveness in municipal services and programs. It serves as the primary point of contact for documenting and communicating the status of active citizen requests ("ACRs") and supports the delivery of various programs.

As the central hub for interaction, the Centre connects residents with Markham's 22 departments and supports recreational programs. It handles calls, emails, chats, and social network queries on behalf of the departments and triages service requests through the ACR system to the appropriate department for resolution. The Centre also tracks the status of ACRs and communicates with residents as needed. Centre staff fully resolve most resident queries as the first point of contact. The Centre operates from Monday to Friday, 8:00 am to 5:00 pm, at the Markham Civic Centre. Staff are available after hours until midnight for emergency call-outs for critical services. Outside these hours and during weekends and holidays, Markham's in-house security team manages and handles emergency requests.

In addition, the Centre assists residents in reaching the appropriate government area, navigating the website for self-service, and completing necessary program applications online. It also provides internal services to various Markham departments. The range of services provided externally to residents and internally to departments includes the following:

Services Provided to the Public	*Reception Services – assistance to in-person visitors at the Civic Centre's Thornhill entrance daily (Monday to Friday - 8am to 5pm)*
	Active Citizen Requests (ACRs) – triage and communication, escalations and call-outs, status follow-up and call backs to residents
	Recreation Services – program registration/cancellations/changes and payments/refunds/subsidies
	Animal Licences – renewals
	Business Licences – renewals
	Water and Similar-Type Appointments and Administration – shut-off, meter replacements, appliance and metal pick ups, payments, scheduling, etc.
	Snow WINDROW Removal Administration

Services Provided to Markham Departments	*Active Citizen Requests (ACRs) – forwarding, tracking and monitoring*
	Departmental Support / Administration Services – processing of credit card charges, refunds, payments, finance adjustments, etc.
	Customer Service Surveys - conducting resident experience surveys (i.e., animal licencing, business licencing, processing, etc.)

Over the past two decades, the Centre's service delivery model has evolved to include multiple communication channels, such as in-person, phone, live chat, chatbot, email, and portal services during regular business hours and after hours. The Centre use various technology platforms, as well as ACRs, to ensure prompt communication with residents and relevant departments. To help residents who speak different languages, the Centre provides support in various languages, including English, French, Chinese, and South Asian languages.

The Centre's current staff comprises six full-time and 21 part-time resources. Refer to the table below for a summary of the Centre's staffing history since its inception in 2003:

YEAR	STAFFING HISTORY	YEAR	STAFFING HISTORY
2003	**In 2003, Contact Centre was established with:** 1 x Manager 5 x Full-Time Customer Service Representatives ("CSRs") 7 x Part Time CSRs	2011	**In 2011, the Manager position was eliminated in August 2011:** 1 x Manager (to August 2011 only) 1 x Supervisor 1 x Care / ACR Trainer Administrator 4 x Full-Time CSRs 21 x Part-Time CSRs
2004	**In 2004, the Centre added 14 additional Part Time CSRs and 1 Supervisor:** 1 x Manager 1 x Supervisor 1 x Care / ACR Trainer Administrator 4 x Full-Time CSRs	2023	**As of 2023, staffing of the Centre was comprised as follows:** 1 x Manager (Supervisor position was re-evaluated in 2016 and became the Manager position) 1 x Business System Support Specialist (Care/ACR Trainer Administrator position was renamed the Business System Support Specialist in 2023) 4 x Full-Time CSRs

	21 x Part-Time CSRs		21 x Part-Time CSRs (the number of CSRs in the part-time pool has fluctuated over the years but the average number of CSRs in it is 21)

OBJECTIVE

The objective of this engagement was to review the current processes, procedures, workforce design, governance model, and tools employed by the Centre to identify opportunities for improvement.

SCOPE

The engagement focused on reviewing the following areas:

1. **Roles & Responsibilities:** Review the current practices, skills, and tools used by resources supporting Centre operations and identify improvement opportunities.

2. **Current Staffing Model:** Review the current staffing model and work with key stakeholders to identify how call volumes, nature, utilization, effectiveness, and wait times impact the Centre's utilization. Define opportunities that may enable the Centre to provide increased call volumes and a broader scope of services.

3. **Scalability of Operations:** A review of the Centre's existing management systems and tools to evaluate requirements for scalability, adoption of process automation, resident complaint management, and coordination with other internal specialist groups.

4. **Benchmarking:** A high-level benchmarking exercise of the City's key performance indicators against those from comparable cities to recommend opportunities for improvement.

5. **Current Service Levels:** Review of the current service levels (including processes, volume of data, technology, and tools used by the Centre) to determine the Centre's ability to maintain current service level and/or provide additional work capacity.

APPROACH AND FRAMEWORK

In order to conduct the analysis, MNP used the framework shown here, which assesses People, Process, and Technology. This framework has been successfully used to assess how these three elements work together to enable organizational success and outcomes. This report provides the analysis of the frameworks' three elements - People, Process, and Technology - in relation to the Centre, captured in the following categories:

- Current State Observations

- Strengths

- Key Opportunities and Recommendations

Procedures conducted during the engagement included the following:
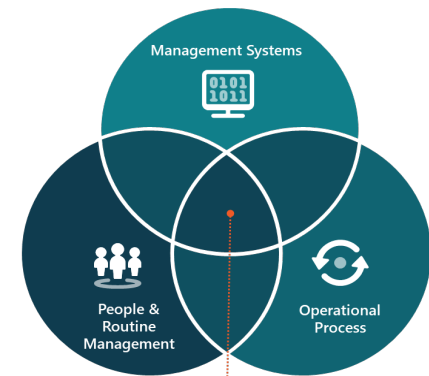
MNP's Business Review Framework

	Interviews: Interviews were conducted with management and staff across the Centre to understand the organization's ability to execute on its goals and its current pain points with regards to execution.
	Process Observations: The daily routines of the Centre's staff were assessed to identify processes that impact the Centre's current service levels and improvement opportunities across the department.
	Capacity Analysis: Based on review of historical call volume, chat bot contacts, the context provided during the interviews, and process observations determined the Centre's productivity, utilization, and potential capacity.

ACKNOWLEDGEMENT

We want to express our appreciation for the collaboration and contributions with Centre and Markham personnel.

LIMITATIONS AND RESTRICTIONS

This report is intended solely for the information and use of Markham and should not be distributed to third parties without MNP's prior written consent. Any use that a third party makes of this report, and any reliance or decisions made based on it, are the responsibility of such third party. MNP accepts no liability or responsibility for any loss or damages suffered by any third party as a result of decisions made or actions taken based on this report.

CONTACT CENTRE ANALYSIS

As outlined above, analysis was conducted through the lens of the three elements of our framework – People, Process and Technology – to understand the **current state** and identify **strengths** to highlight **key opportunities and recommendations** for improvement. These have been documented in the following pages of this report. Detailed analysis and benchmarking data has been provided in various Appendices and referenced in the sections below, as applicable.

Please note the analysis was undertaken between July and August 2023, prior to the launch of the Xplor system.

CURRENT STATE OBSERVATIONS, STRENGTHS AND OPPORTUNITIES

A. People

Current State Observations	Strengths	Opportunities
• The Centre opened in 2003 and has since been the main service point for residents for the 22 civic departments and other supporting civic administrative services. • The team comprises six full-time members, including one Manager, one Data Specialist, and four CSRs. Additionally, there are 21 part-time agents. • There is a flat organizational structure, with the manager as the only formal team lead. • Neither the team size nor the ratio of full-time FTE to part-time PTE has changed since 2011. • Training periods for new CSRs average four to six weeks as each CSR supports all the City's services, adding complexity and length to the training program.	• Despite a significant increase in population, the Centre has attained high standards of service using the same number of resources for many years. • The Centre employs a diverse workforce to best serve the City's diverse community. The Centre provides employment opportunities for a diverse workforce, including individuals with disabilities. • Since its inception, the Centre has successfully provided skilled and knowledgeable staff to fill internal front-line and customer-facing roles, serving as an internal resource pool. While this is a strength, it is also a challenge resulting in high turnover in the part-time CSR staffing pool. • The Centre's training approach to customer service and the extensive knowledge of the City have often led the part-time CSRs to secure permanent assignments in other city	• The Manager role is the only formal supervisory role that provides support, guidance, and management of escalations. This structure can increase the Manager's workload, which can cause bottlenecks or delayed decision-making if the Manager is unavailable. • Due to the unionized nature of some of the Centre's staff, certain types of work (i.e., management tasks) are unable to be delegated from the Manager role and certain levels of hours are required to be scheduled for certain roles. These requirements pose challenges in areas such as scheduling, delegation of work, training, and roles and responsibilities. • Significant time can be spent training new employees, many of whom do not remain with the Centre for a long time. • Due to the limited number of hours worked or time of day that part-time CSRs work, they may

Current State Observations	Strengths	Opportunities
• The busiest daily on-call[1] activities periods are 8 AM to 10 AM and 3 PM to 4 PM. The call volumes observed on Mondays were approximately 20% busier than on most other days of the week largely from the weekend backlog as the Centre is not open for regular business on weekends. *(Refer to Appendix A)*. • If a part-time CSR cannot address a resident request or enquiry, they direct the request to either a full-time CSR or the Manager. • Based on call data observations, on average, 12 to 14 members of the CSR team are assigned on-call duties throughout the day, spending 23 to 33 minutes per hour dealing with phone calls. (Note: utilization times provided above do not account for other work the CSRs undertake for after-call follow-up and/or non–call related work activities such as ACR updates, email responses, walk-ins, chat responses or support services for other Civic departments, as well as lunch/break times.)	departments, contributing to high turnover in the part-time work pool. • The Manager's role is to actively observe and manage operations, providing direct support when required, and the Centre has an open-door policy for any staff who needs assistance. This constant engagement and support fosters a strong sense of service excellence within the Centre.	struggle to build expertise in specific areas or may not have the opportunity to handle complex items in a short period of time. This can impact the overall depth of knowledge within the Centre, resulting in greater workloads for full-time resources. This can also lead to a lack of motivation and high turnover rates for part-time CSRs due to limited career progression, resulting in the need for continuous recruitment. • Inability to measure the total utilization and performance of CSRs across Centre activities, as the data does not exist within existing systems.

[1] **On-call** or **on-chat** work refers to the time a live CSR is available or actively responds to customer inquiries. This time can be tracked when a call/chat is answered and closed or when they are waiting for a call/chat to be assigned. **After-call** work involves the administrative tasks performed after completing a customer interaction, such as documentation and updating records. **Non-call** work activities encompass tasks performed by a CSR that do not involve directly interacting with customers over the phone or chat. These activities may include administrative duties like data entry, updating requisite information for a department request, responding to emails or chat messages, conducting surveys, and participating in training sessions or team discussions.

B. Process

Current State Observations	Strengths	Opportunities

• The Centre team uses a daily task list manually created using Excel in Google Docs. This is an important tool for managing daily work.
• Council has approved the following target service level for the Centre:
  o 70% of calls must be answered within 30 seconds.
• Internally set KPIs are as follows:
  o Email response within 48 hours (before COVID, email response was targeted at 24 hours).
  o 80% first call resolution.
• The Centre responds to emails in sequence, and if urgent, residents can contact the Centre by phone. Emails are assigned daily and are to be responded to when not assigned other duties (i.e., on-calls). All CSRs are able to respond to emails.
• The Centre receives 40 to 60 live agent chat requests daily, representing 79% of all chat requests received over the data collection period. *(Refer to Appendix A)*
	• In addition to the Council set target service level, the Centre has established a set of KPIs that can be measured and tracked using the existing systems, providing a strong measure of performance that is trackable and defensible based on existing routines and systems. These are posted on Markham's intranet site for access by council members and departments.
	• The Centre consistently delivers exceptional service to residents, as evidenced by the following target service level metrics and benchmarking analysis - *refer to Appendix B*:
	  o Based on 2022 data, 80% of calls are answered within 20 seconds (10 seconds faster than the target service level).
	  o First call resolution at 85.1%[2].
	  o Resident satisfaction rating of 4.1 out of 5[3].
	  o Low call abandoned rates at 16.8%[4] (This rate is impacted by the higher Monday
		• ACR updates can only be obtained when escalated through the Manager role within the Centre which can cause bottlenecks or delayed decision-making if the Manager is unavailable.
		• Other than when a resident's request creates an ACR, the Centre does not track the reason codes for calls or non-call related requests. There is no platform to facilitate recording of reason codes and the nature of requests across all contact mediums. Due to the absence of this data, the Centre is unable to identify the full picture regarding trends or patterns in resident inquiries or issues. In addition, without this data, it is difficult to determine the appropriate staffing levels and skill needed to address different types of requests.
		• The Center has dashboards in place that are used to report and communicate results, but they are not automated or aligned to include all activity/reason codes of customer requests. This results in a manual and time-consuming process and incomplete reporting.
		• Statistics related to the number of emails received daily, assigned, escalated to create an ACR, and

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[2] The first-time call resolution rate of 85.1% is significantly higher than peers at 52% for the City of Vaughan and 55% for the City of Hamilton. This strong data point supports the current training routines and leadership at the Centre. CSRs are well-trained and possess extensive knowledge of departmental services, programs, and procedures. This exceeds the Council set target service level of 80%.

[3] Via post-call surveys, the Centre has obtained feedback indicating a high level of resident satisfaction and a positive community presence among Markham's residents.

[4] The Centre has a 16.80% call abandoned rate, which is lower than the City of Vaughan (which is 25%) and close to the 15% call abandoned rate at the City of Hamilton. It is important to note that the City of Hamilton's Contact Centre is staffed with significantly more resources than Markham's.

Current State Observations	Strengths	Opportunities
• Based on Case Data created between January 2023 and June 2023, an average of 4,209 cases were created each month or 29% of all calls received. This translates to approximately 18 daily cases. *(Refer to Appendix A).* • A chatbot was recently introduced, which has addressed 21% of all chats received, reducing the number of live chat requests. Residents can still refer to a live CSR, however, the level of engagement could be higher since residents do not use the chatbot often since it is inefficient and not truly an AI chatbot.	and Tuesday morning call volumes, which result in higher call abandonment.) o The percentage of calls transferred to departments is low at 7.55%, reflecting that CSRs can satisfy customer requests at the first point of contact as noted above.[5] • The Centre tracks trends on case types, and this data is relevant and tracked consistently. It is also made available to all departments and to Council.	resolved are not tracked. At the time of this review, it was observed that many email response times were close to 72 hours, which is greater than the internal service level standard of 48 hours.

C. Technology

Current State Observations	Strengths	Opportunities

• To deliver and manage its services, the Centre uses various tools and technologies. Some of the key tools include:
   o CRM (the Active Citizen Request Management platform) to record and assign ACRs to various departments for resolution.
   o Chatbot to address resident requests. The chatbot employs automated responses and leverages the Centre's internal knowledge base to automatically generate answers to various questions.
	• There is a culture within the Centre to willingly adopt new technologies and innovations to enhance service delivery.
	• The Centre has taken important steps towards adopting new technologies and tools to improve efficiency and exceed service level targets set internally by the Centre and by Council. Some of the tools that have been implemented include a chatbot, the XPLOR system to replace the previous EZReg system, Hoot Suite to replace Sprout Social, and the adoption of MS 365. These innovations have
		• The Centre does not have data monitoring and management procedures across all services and work delivered. For example, existing data tracking routines only monitor an assigned CSR's on-call[1] and on-chat[1] schedules and fail to track the time taken for on-after-call[1] routines, renewals, payment processing, water, and other related appointments. The lack of data to track the output of all CSRs has led to static planning and difficulty in measuring performance against defined targets.

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[5] Strong communication skills when handling resident concerns professionally and courteously is a contributing factor to the low transfer call rate of only 7.55% of all calls received. The City of Vaughan's transferred call rate is 45%. The City of Hamilton does not track this metric.

Current State Observations	Strengths	Opportunities
o Amanda software to automate, track, and analyze core building permitting and licensing processes. o EZReg for program registration (replaced by XPLOR), which did not permit more than 1,000 active users at to register simultaneously for an open program at any one time[6]. o Hoot Suite (replaced by Sprout Social) is a set of tools for managing social media conversations and leveraging potential solutions for customer service and social listening. o Google Docs to manage schedules and track resource hours for budgeting. o Microsoft 365 for email communication with residents and internal communication with all departments. • The Centre does not use interactive voice response ("IVR") systems to direct resident calls or offer call-back features. All incoming calls are attended to on a first-come, first-served basis, and callers are placed in a queue until the next available CSR can assist them.	been significant and incremental, reflecting the Centre's commitment to staying current with emerging technologies and improving ACR efficiency. • Several manual data collection methods and multiple spreadsheets (i.e., dashboards) have been implemented to monitor operations and track results.	• Due to the lack of an integrated CRM and scheduling system data on all activities, tracking time spent on-call, non-call, and after-call[1] work undertaken by the CSR is absent and not completed, giving false or incomplete insight into utilization rates. • Multiple spreadsheets, which are used as dashboards, and KPI monitoring are utilized to manage the team's performance. An integrated dashboard to manage all data, KPIs, and exceptions does not exist, making it increasingly difficult to identify trends and patterns, be responsive, and drive further improvements in service levels. • Google Docs is used to schedule resources at the Centre, which limits scalability and real-time visibility. The Google Docs scheduling tool cannot handle the large data volumes required for dynamic planning and performance metrics, including scheduling employees' integration of skills, preferences, shift rotations, breaks, and service level adherence. Google Docs may not provide sufficient flexibility to handle these complexities effectively, leading to sub-optimal schedules and potential service disruptions. • There is no interactive voice response ("IVR") system to enable residents to navigate to different reason codes for a more accurate call routing process.

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[6] At the time of our analysis, the Centre utilized the EZReg system, allowing a maximum of 1,000 users to access all open program registrations at any time. Once the online system reached saturation, the volume of calls overwhelmed the CSRs, with residents using the call time to register for more than one (1) program at a time, increasing the backlog. This resulted in high wait times, higher-than-average abandon rates, and the highest weekly call times. Since launching the new online registration platform (XPLOR), the Centre has communicated the new platform has significantly addressed the previous bottlenecks with online registration and incoming high call volumes.

KEY OPPORTUNITIES FOR IMPROVEMENT AND RECOMMENDATIONS

Implementing improvements across People, Processes, and Technology will assist the Centre in addressing many challenges in capacity planning, improving service levels, and driving productivity improvements. Their adoption can enhance the Centre's strong service levels and drive greater value in the scalability of existing resources.

The following table provides the **current state observations** and provides corresponding **recommendations** and **opportunities for improvement**.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
1	**Organizational Structure** MNP observed the following regarding the team's organizational structure: i. Since 2011, the Centre has lacked a supervisory or team lead role, putting the entire active management responsibility on the Manager role. The Manager role is also responsible for scheduling and adjustments for a team of 25, creating higher workloads and increasing the risk of decision-making bottlenecks. **Impact:** The Manager role frequently observes day-to-day operations on the floor, spending time providing observational interventions and corrections rather than broader metrics or data-driven decision-making. ii. One contributing factor to high attrition rates and employee turnover rates might be the lack of career progression opportunities.	**Introduction of Team Leads Structure** The introduction of a formal team lead structure will drive the business to deliver: - <u>Immediate Supervision:</u> Team leads on the floor can provide immediate supervision, guidance, and support to the CSRs when handling inquiries or complex issues. - <u>Resource Management:</u> Team leads can be responsible for managing resource allocation, including assigning tasks, distributing workloads, and optimizing staff schedules. - <u>Coaching and Training:</u> Team leads can provide real-time coaching and training to CSRs. They can offer guidance on handling challenging situations, improving communication skills, and staying updated on government policies and procedures. - <u>Quality Assurance:</u> Team leads can be instrumental in monitoring and maintaining the quality of services provided by CSR. They can conduct regular	**Contact Centre Staffing Update** As part of the 2024 Budget process, approval was granted for a new Supervisor for the Contact Centre, who began work on July 22, 2024. The new Supervisor oversees the part-time CSRs and supports the Manager with case management, escalations, scheduling and other responsibilities. The addition of the Supervisor reduces the workload of the existing Manager, allowing them more time to address several concerns noted in this Contact Centre Review. Other staffing strategies will be assessed to determine optimal deployment of resources to address current pressures and gaps in the Contact Centre.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	Impact: High employee turnover causes knowledge loss and reduces productivity due to the time required for onboarding new CSRs, which takes on average four to six weeks. iii. Experienced CSRs voluntarily help the Manager role by assuming greater responsibilities. **Impact:** As the supervisory role is informal, the voluntary actions of experienced CSRs may not always drive active completion and measurement of performance in such aspects. iv. Due to the absence of other supervisory roles (i.e., team leads and/or supervisors), there is limited adequate floor management, as the Manager role is moving between broader Centre management, escalation of issues, strategic initiatives, training, and resource planning. **Impact:** As the sole supervisory role, the Manager role manages multiple initiatives and activities which can impact the time allocated to the floor management which may result in increased employee turnover, decreased productivity, delays in handling escalations, longer coaching and development of resources, and risk of timely correction of poor performance.	evaluations, provide feedback, and ensure that CSR adheres to service standards. - <u>Escalation Handling:</u> A team lead can step in to address more complex matters and serve as a point of escalation for agents and liaise with other departments when necessary. - <u>Drive Greater Active Management:</u> Alleviate the workload of the Manager role to focus on addressing bottlenecks in overdue ACRs, focus on strategic initiatives, and use data to drive active management decision-making. Additional recommendations could include: - Including a Supervisory role which could manage the performance of Centre CSRs and assist by monitoring performance targets by role, tracking progress, and providing coaching and support to help CSRs achieve their goals and maximize productivity. - To lower attrition rates, increasing the proportion of full-time CSRs to part-time CSRs may create greater stability in workforce management, better retention of experienced CSRs, and greater career stability at the Centre. - Develop a Recruitment Policy that could include the length of time a CSR must remain employed with the Centre before being eligible for applying to other internal positions.	

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
2	**Data to Drive Active Planning & Management** MNP observed the following regarding the use of data to drive Centre planning and management: i. The Centre's current approach to resource management is to use an Excel withing Google Docs which assigns CSRs a set schedule or task list with predefined tasks. Incorporating any change to the day's predefined or preset routines is usually very reactionary and in response to unplanned tasks. ii. Additionally, disparate data sets with a large volume of information, including a lack of integration of the Centre's and Markham's corporate systems, make synthesizing data for effective decision-making challenging. **Impact:** Static management, higher idle times, and/or significantly busier than recommended times/hours can result in an ineffective allocation and utilization of resources, lowering productivity and increasing costs. Additionally, without data-driven insights, the center may struggle to consistently meet service level targets, which could lead to resident dissatisfaction. iii. As live data flow is neither complete nor integrated, live data is not used to inform decision making as these instances occur. Pre-set thresholds that trigger flags for team	**Implementation of New Data Management Systems** An effective data management system can be an indispensable tool for managing Centre operations effectively. By harnessing the power of data, the Centre can enhance customer service, optimize performance, ensure compliance, and drive continuous improvement in operations. An effective data management system plays a key role in optimizing workforce management and ensuring smooth operations. It can also drive cost efficiency, reduce burnout and turnover, and enhance forecast accuracy and data-driven decision-making in workforce performance. Potential systems the Centre could explore include: i. A **CRM system** enabling CSRs to access customer profiles, history, and preferences, facilitating personalized service, creating and managing case file ticketing, and efficient issue resolution. The new CRM should serve as a centralized database for storing comprehensive customer information, including details of calls, which would improve customer satisfaction. A CRM system would allow for quick retrieval of resident profiles, past ACRs, and updated records in real-time, minimizing call handling time and enhancing productivity. The CRM platform should also integrate with call routing software to intelligently route incoming calls based on	**CRM System Update** The Contact Centre recently secured approval for a new CRM system and is currently in procurement for a System Implementer to assist with implementation. It is expected that the new system would be set to launch in the fourth quarter of 2025. This new system will address many of the shortcomings of the existing CRM system, including the following: • Data integrity • Self service capability • Customizable reporting • Live dashboard • Simplified workflows The new CRM will be compatible and fully integrated with many of the applications the City currently uses. In addition, it will work with the existing phone system and with any potential future phone system. **Workforce Management (WFM) System Update** Municipal Contact Centres have very specific operational needs. Various

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	intervention have not been implemented and an integrated dashboard to manage all data, KPIs, and exceptions does not exist making it increasingly difficult to identify trends and patterns, be responsive, and drive further improvements in service levels. **Impact:** The Centre faces limitations in proactively managing with limited available data. The Centre sifts through large data flows and platforms to identify issues. The data necessary for active resource management is not organized based on utilization or performance, leading to observational decision-making. This can result in insufficient or inefficient time allocation.	predefined criteria. The CRM platform would also enable performance tracking and reporting based on analytics to track KPI results, such as response time and resolution rates. (*Refer to **Recommendation #3** for KPI related recommendations and* **Recommendation #6** *for more details of the ticketing portion of a CRM system.*) ii. A **Workforce Management (WFM) System** that provides tools for forecasting Centre volumes, scheduling agents, and optimizing workforce productivity to ensure adequate staffing levels meet service level targets and minimize wait times. (*Refer to **Recommendation #4**.*) iii. A **BI platform** can aggregate and visualize data from various sources, including the Centre's non-call-related operations, to create interactive dashboards, reports, and visualizations. BI tools can enable the Centre to track KPIs, identify trends, and make data-driven decisions for planning and management in real time. (*Refer to **Recommendation #3**.*)	scheduling systems have been researched to determine if they meet the needs of the Contact Centre. However, at this point in time, the City has found no WFM system that meets the following needs: • Incorporation of historical call volume to predict service level requirements; and, • Account for different skillsets and responsibilities, example emails and administrative tasks, training etcetera. In the absence of a suitable WFM system, the Contact Centre (like many other Municipal Contact Centres) has recently developed a new spreadsheet that utilizes macros and advanced formulas to optimize staff scheduling. This tool leverages historical call volume data to predict service levels based on daily staff schedules and accounts for various tasks beyond phone calls, including front counter duties, administrative work, and training. This approach aims to enhance budget management and ensure management is optimizing resource deployment.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
			BI Platform Update The Contact Centre is currently working with ITS to automate data feeds to provide real time dashboard data on service metrics and KPIs using Microsoft PowerBI. The new CRM system will automate and improve reporting with the use of customized query data selection, saving time and allowing staff to see information necessary to make informed decisions and to provide the Centre's stakeholders with a better understanding of operations.
3	**Routine Management Impacted due to Lack of Integrated Dashboards and KPI Tracking** MNP observed the following regarding the team's reporting processes: i. A daily task list is prepared, but no target output outcomes have been communicated to the team. This can result in CSRs self-pacing their workload. Due to the absence of integrated tools, ease of live measurement, and dynamic assignment of tasks, management is unable to leverage additional KPIs such as, but not limited to, calls/minute, # number escalations/week, emails responded/hour, idle time, time-spent on	**Performance Dashboard** A dashboard that integrates across the various data management routines of the Centre's various systems, including a CRM and live scheduling, should be implemented. The visualization of KPI results and other key monitoring aspects of operations, would enable management to monitor performance and drive improvements in service level on a real-time basis. The performance insights should be tracked, monitored and regularly reported internally at the Centre, to Markham's senior leadership, and to Council. The performance dashboard should seamlessly combine data from the Centre's system (e.g., CRM platform,	**Performance Dashboard Update** The City supports the need for enhanced reporting and data mining to facilitate decision making. The new CRM system (i.e., Microsoft Dynamics) is expected to meet these requirements.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	non-call and after-call work, and daily task list attainment to drive greater performance excellence than those currently attained. ii. Several manual data collection methods and multiple spreadsheets (i.e., dashboards) have been implemented to monitor operations and track results. **Impact:** The lack of live integrated tracking and monitoring KPIs may result in increased variance in key metrics such as call duration, average waiting time, emails/hour, and abandon rates. This may cause inconsistent resident service levels and result in performance measurement being more reportative or anecdotal and not immediately corrective.	workforce management system/scheduling tool, etc.), enabling the Centre to monitor ongoing activities against its established service levels and KPIs, identify deviations from the baseline, and drive improvements. The Centre could also leverage the dashboard to: - Create a feedback loop to communicate performance. - Rollout and track new KPIs (*refer to **Appendix E** for additional metrics the Centre could implement*) to improve performance, utilization, and quality of resident service. - Manage performance by exceptions and leverage the tool to escalate significant deviations in results. With a real-time performance dashboard, the Centre could monitor call volumes, CSR availability, service levels, and other relevant metrics. By having the dashboard display information in real-time, this would provide accurate and timely information to make updates in scheduling and resource allocation and be flexible to address volumes and other situations as they occur.	
4	**Scheduling and Traffic Management** MNP observed the following regarding current scheduling management processes: i. The current scheduling process is consistently static and does not consider the changing daily	**An Effective Scheduling Software** Scheduling software plays a key role in optimizing workforce management and ensuring smooth operations. It can also drive cost efficiency, reduce burnout and turnover, and enhance forecast accuracy and data-driven	**Scheduling Tool Update** The City has long recognized the benefits of an effective scheduling tool. Unfortunately, given the specific operational needs of a Municipal Contact

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	call volumes and peak hours. The schedules are based on estimated personnel rather than historical data, relying on managerial experience instead of actual utilization or volumes. ii. Data analysis shows that fewer resources are allocated at 8 AM and 4 PM compared to other activity periods, leading to higher call abandoned rates. The number of resources available ranges between 7 and 9, which is lower than the baseline of 14 resources per day. As a result, the average lost call percentage across both activity periods is 26%, compared to a week's lost call percentage of 18%. (*Refer to Appendix A*) **Impact:** This approach affects abandoned call rates, service levels, and the Centre's cost efficiency. iii. The highest call volumes occur at 9 AM and 3 PM, accounting for 28% of all call volumes. The Centre's available resources at this time are, on average, between 11 and 13 CSRs, which is marginally 4% fewer than other activity periods. This results in an average call abandoned rate of 20% (*Refer to Appendix A*). **Impact:** Greater inefficiency due to high idle times, as well as resident dissatisfaction due to longer wait times during observed during busy hours.	decision-making in workforce performance. The use of scheduling software will allow the Centre to proactively assign small windows for resources to complete non-phone-related activities. Tracking all activities, such as call, after-call, and non-call activities, will drive greater data-driven management. The deployment of an integrated CRM and Scheduling platform with other corporate and Centre systems will ensure the use of data analytics and live data sets to drive decision-making. (*Refer to* ***Recommendation #2***). The development or implementation of an integrated scheduling tool for resource management and workflow allocation will contribute to the overall efficiency, effectiveness, cost control and success of the Centre's operations. The tool would enable the following: - Optimize Workforce Allocation with expected call volumes and other operational demands. The tool should ensure that staffing levels match the workload by analyzing historical data and forecasting future needs. - Cost Control to efficiently schedule and minimize cost overruns from overstaffing during low-demand periods and prevent poor performance due to understaffing during peak times. - Real-time Monitoring and Adjustment capabilities, allowing the Centre to track performance and adjust	Centre, there does not appear to be scheduling software options that fully address operational needs of this business environment. Most existing products fail to consider factors like staff skill sets, service levels, training, and historical data. The City will continue to explore scheduling tools with a view to acquiring a product that meets all of the Centre's identified requirements. In the meantime, a new spreadsheet has been developed for use in the Contact Centre. It utilizes macros and advanced formulas to optimize Contact Centre staff scheduling. **Establish a Call-Back Process Update** The Contact Centre has tested the automated call-back feature of the existing phone system. Unfortunately, it did not function as expected and negatively impacted service levels. We will continue to monitor the marketplace for a suitable tool that meets all of the Contact Centre's needs. **Email Backlog Clearance Update**

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	iv. Emails received during the day are only assigned to specific CSRs for response, thus resulting in only a select few emails being addressed each day during normal business hours. This has caused an upward trend in email response times (i.e., close to 72 hours). **Impact:** Internal service levels have been changed but cannot currently be improved due to a lack of scheduling to reach prior standards. Additionally, there is greater inefficiency during idle times as work is not reassigned during less busy hours. v. Currently, the centre does not measure the time a resource takes on <u>non-call or after-call activities</u>[1], which results in an incomplete understanding of available capacity and traffic management planning. **Impact:** If non-call and after-call-related tasks are not tracked and organized, there is a greater risk of understaffing and overstaffing in peak and low periods, respectively. This can result in missed service level standards. It also increases the risk of CSR burnout due to excessive workload. Furthermore, the performance of a CSR cannot be fully quantified, leading to an incomplete measurement of their performance.	schedules dynamically. This will ensure quick responses to unexpected changes in call volume or resource availability, maintaining optimal resource allocation across the various call and non-call related work. **Establish a Call-Back Process** Traffic management and scheduling in sudden peaks can be significantly improved by implementing a call-back feature integrated with the telephone system. The feature will reduce abandoned call rates and waiting times. *(For additional details, refer to **Recommendation #5**.)* **Email Backlog Clearance** Responding to email requests has increased from 24 to approximately 48 hours and seems to be trending higher more recently as communicated to MNP. To address the backlog of emails, the Centre should consider assign the task of preparing email responses to a CSR working during the late-night shift which could significantly reduce the workload of CSRs during the day, as call volumes during the evening shift averages less than an hour, in total. **After-Call Work and Non-Call Work** In addition to monitoring on-call/on-chat work times, monitoring a CSRs activity on other important activities at the Centre (i.e., after-call and non-call activities) will	The Contact Centre has recently implemented several strategies to address the email backlog. One CSR will be dedicated to handling emails daily, and three additional agents will focus on administrative tasks from 5:00 PM onwards when call volumes decrease. Two of these agents will work from 12:00 PM to 9:00 PM, while the third will cover the 4:00 PM to 12:00 AM shift. These agents will manage remaining emails between calls. Additionally, staff anticipate that the new CRM system will help track the source of cases — whether via phone calls, emails, chats, or walk-ins — allowing turnaround times to be monitored and ensuring more accurate service level metrics for emails. **After-Call Work and Non-Call Work Update** The Centre's current phone system lacks the capability to accurately differentiate between after-call work and non-call work. To effectively monitor KPIs, the Centre requires a CRM and phone system with this functionality. At present, after-call work is aggregated for the entire day, and

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
		improve the understanding of resource utilization and true availability across all work activities and tasks	there is no detailed report identifying specific "made busy" times, which are crucial for measuring performance and ensuring the proper use of time. The new CRM will help the Centre develop stronger reporting tools as the expectation is that it will be integrated with the current or future phone system.
5	**Interactive Voice Response and Call Back Feature** MNP observed the following regarding interactive voice response ("IVR"), and call back features: Call Routing and Specialization: iii. There is no IVR system to enable residents to navigate to different reason codes for a more accurate call routing process. iv. As there is no IVR system, no pre-set messaging can be established that can auto-respond to a host of standardized requests or communicate the status of an open ACR. **Impact:** Due to the absence of an IVR system, there is no mechanism to route calls directly to CSRs equipped or specialized in certain issues or requests. Therefore, all CSRs must be trained on all services to maintain a similar service level.	**An Advanced Phone System with IVR** An IVR will allow residents to receive greetings and welcome prompts upon dialling in. A pre-set list of menu options, usually numbered, facilitates the caller's self-navigation of the nature of the request via pre-set options. This also allows for the determination of specialists in select departments and services and provides self-service options for residents to obtain information quickly without speaking to a live CSR. Such an approach can free up time for CSRs as some calls or requests can be addressed from standardized messaging. Additionally, creating a general enquiry option may allow specialists to address more complex requests. This can also gradually reduce the time new part-time CSRs take to be trained on select skills while alleviating the specialists' workload.	**Advanced Phone System with IVR Update** As the Contact Centre acts as a 'one-stop shop' for Markham's residents and customers, implementing an IVR system (or "phone tree") — commonly used by businesses to direct callers to specific departments like 'sales,' 'claims,' or 'billing' — would be unnecessary. Since the Contact Centre manages all incoming calls, providing IVR options may add frustration to the caller experience. Instead, tracking metrics through the CRM, which captures all customer entry points, would be a far more effective solution.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
	Call Back Feature:	The data from an IVR system would also allow the Centre to evaluate and monitor many analytical features - for example, call volumes, complexity, length of calls - and allocate resources and training by respective services. Additionally, if the wrong IVR code is selected, a dynamic system would allow the CSR to redirect the call to the correct specialist as required.	**Service Specialists within the CSR Team Update**
	v. The absence of a call back feature at the Centre maybe contributing to long wait times, increasing abandonment rates, reduced efficiency, missed service level improvement opportunities, and potential difficulties managing call spikes.		All Contact Centre staff are fully trained to handle a wide range of inquiries. Focusing only a few team members on a particular subject may create unnecessary service delays and backlogs when call volumes are high. This approach also fails to account for absences and vacations, and staff turnover, as well as the alignment of scheduling for part-time staff with specific expertise on a shift.
	Impact: A call back feature would allow for timely call returns back to a resident, resulting in reduced wait times, improved resource management, lower abandoned call rates, increased first call resolution rates and overall optimization of the Centre's performance.	**Creation of Service Specialists within the CSR Team**	
		With the use of an IVR system, the CSRs can specialize in certain requests, while some could be trained as generalists. This may result in quicker generalist training for new CSRs, and more specialized and focused training for others with specific skill sets, resulting in overall improved service level responses. It may also offer an opportunity to further improve first-call resolution rates by directing resident calls or requests to CSRs who are specialists in select departmental services.	By training all staff to manage inquiries across all departments, the Contact Centre can better manage call volumes and avoid the bottleneck effect that specialization can create. A fully trained team creates a more balanced and responsive team.
		Use of Auto Responder Rule	**Auto Responder Rule Update**
		Auto-Response Rules can further empower the Centre to automate responses to select questions or requests that specific pre-recorded responses can address. By leveraging this feature, resident's calls can be expedited.	The Contact Centre operates a multi-channel environment with opportunities for self service through the City's website, and chatbot. With the pending deployment of a more advanced CRM, customers will have greater opportunity to use self service with more guidance and

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
		Adoption of a Call Back Feature Providing residents with a call-back feature will help reduce abandon call rates and call waiting times. Two different options have been provided below for Markham's consideration: A. **A queue call-back feature:** Where residents are provided the option to have an CSR return their call – in the order it was received – rather than wait on hold on the phone, which increases wait times. Requesting a call-back is typically simple, involving a single button click once a customer is in the traditional phone queue. Call-backs are scheduled by the system in order thereby not significantly reducing the workload of the CSRs during a period of time. B. **A scheduled call-back feature:** This approach sets a CSR to return a call within 24 hours, usually outside of peak hours. This ensures better resource management during peak call/request volumes. By offering residents the option to request a call-back, the Centre can increase satisfaction, retention, and efficiency, ultimately leading to higher-performing operations.	user experience. Contact Centre staff continue to look for opportunities to enhance our service with the tools we have available or future tools to help better align with customer needs. **Call Back Feature Update** The Contact Centre has previously tested an automated call-back feature which unfortunately did not function as expected. Staff will continue to keep review options for tools that better meet the Contact Centre's needs and enhance the customer experience.

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
6	**Open ACR Ticket Management** The Centre is responsible for entering case details as ACRs, which get synced with the various departments as open tickets. The activity dates are available, but through a very manual process. The service levels of case resolution are determined by each department and are likely to be different depending on the nature of the work undertaken by each department. The Centre is not responsible for expediting the process but can only communicate to the resident the standard service level standard by which the department is expected to address timelines within the ACR. In the event a resident follows up on an ACR that has not been completed within the stipulated service level standard, the Centre must manually follow up with the respective department to get an expected addressal date. **Impact:** Bottlenecks and longer calls when a resident follows up for a status update, as the overdue ACR needs to be followed up manually with other departments and often requires the Manager role to escalate to get a response.	**Automated Open Ticket Management Process** An automated process (i.e., within a CRM system) to track the status of overdue ACRs should be developed. Such a process could greatly assist in addressing many current issues around ACR ticket management which have become very onerous for the Centre, as it constantly struggles to get internal departments to close the loop on overdue ACRs. A supporting feature of an open ticket management process and system could include self-help options for residents to track the status of their ACR based on a unique case ID #, which could be entered and tracked via a web portal or entered as an alphanumeric entry on an IVR system. **Formal Review Process** The Centre should also develop a formal process for reviewing ACR status. This could include a regular meeting with departments to discuss overdue ACRs and to update next steps, expected resolution date, and relevant information. Alternatively, a weekly or bi-weekly report from each department could be provided to the Centre that provides status on each open and overdue ACR, with expected closure date.	**Automated Open Ticket Management Process Update** Open ticket management is a business requirement for the new CRM. With the new CRM, overdue or out-of-service-level cases can be flagged within a department for immediate attention, eliminating the need for the Contact Centre to follow up on outstanding cases. The intent and expectation is for customers to have a more consistent update on their case submission identifying service levels and expected turn around for completion. **Formal Review Process Update** The new CRM system will significantly enhance the Contact Centre's formal review process by generating daily or weekly reports of outstanding cases for each of the Centre's client departments. Reports can be generated to allow departments to assess their internal service level turnarounds and staffing levels. Based on this analysis, they can determine whether adjustments are needed to service levels, whether issues were caused by rare occurrences like

#	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
			weather events, or if additional staffing is required due to an increasing trend.
7	**Training** Currently, all training and onboarding of new part-time CSRs are conducted live and in-person with on-the-job training provided by either the Manager role or full-time CSRs. During the onboarding and training process, every new part-time CSR is trained on each service offered and each customer contact communication medium available within the Centre. Many Subject Matter Experts ("SMEs") from other departments are also invited to provide specialized in-person training to the entire team as well. **Impact:** The time taken to onboard new CSRs is long, on average four to six weeks, as CSRs learn and understand all complex civic services offered by the Centre. Additionally, this results in significant time spent by both the Manager role and full-time CSRs repeatedly training new part-time CSRs due to high attrition rates.	**Online Training** Developing online training and onboarding programs with specialized training for each service will significantly alleviate time-consuming in-person training. The Centre could also develop a testing module to adjudicate the readiness of a new CSR after they receive their training. The creation of a repository of training videos for in-person sessions held by SMEs from the various departments can also serve as future reference guides for all CSRs. **Specializations** Training programs that facilitate the creation of specialist teams within the CSR pool will ensure a quicker onboarding of new part-time resources and facilitate greater facilitation between the Centre and the respective departments through these teams.	**Online Training Update** The Contact Centre frequently reviews opportunities to improve and streamline training for new and existing Centre staff. By exploring ways to enhance effectiveness and increase efficiencies, we can ensure our team is ready to provide exceptional service to residents and customers. While online resources like tutorials and videos can support training, they cannot fully replace the essential engagement and interaction with trainers and department staff. As such, the Centre is exploring the development of various online training modules to complement hands-on training experiences for CSRs. **Specializations Update** All Contact Centre staff are fully trained to handle a wide range of inquiries. Focusing only a few team members on a particular subject, may create unnecessary service delays and backlogs when call volumes are high. This approach also fails to account for absences and vacations, and

| #	Current State Observations	Opportunities and Recommendations for Improvement	Management Response
			staff turnover, as well as the alignment of scheduling for part time staff with specific expertise on a shift.
			By training all staff to manage inquiries across all departments, the Contact Centre can better manage call volumes avoid the bottleneck effect that specialization can create.

RECOMMENDATION

The Auditor General recommends that:

- The Contact Centre Review Report be received; and,
- That staff be authorized to do all things necessary to give effect to this resolution.

APPENDIX A - ACTIVITY VOLUMES
Utilization – Jan'23 to June'23

For the day shift, the Centre assigns 13 CSRs (on average) to handle calls, emails, and chats each day. These 13 CSRs are utilized on call related activities for an average of 26 minutes/hr each day.
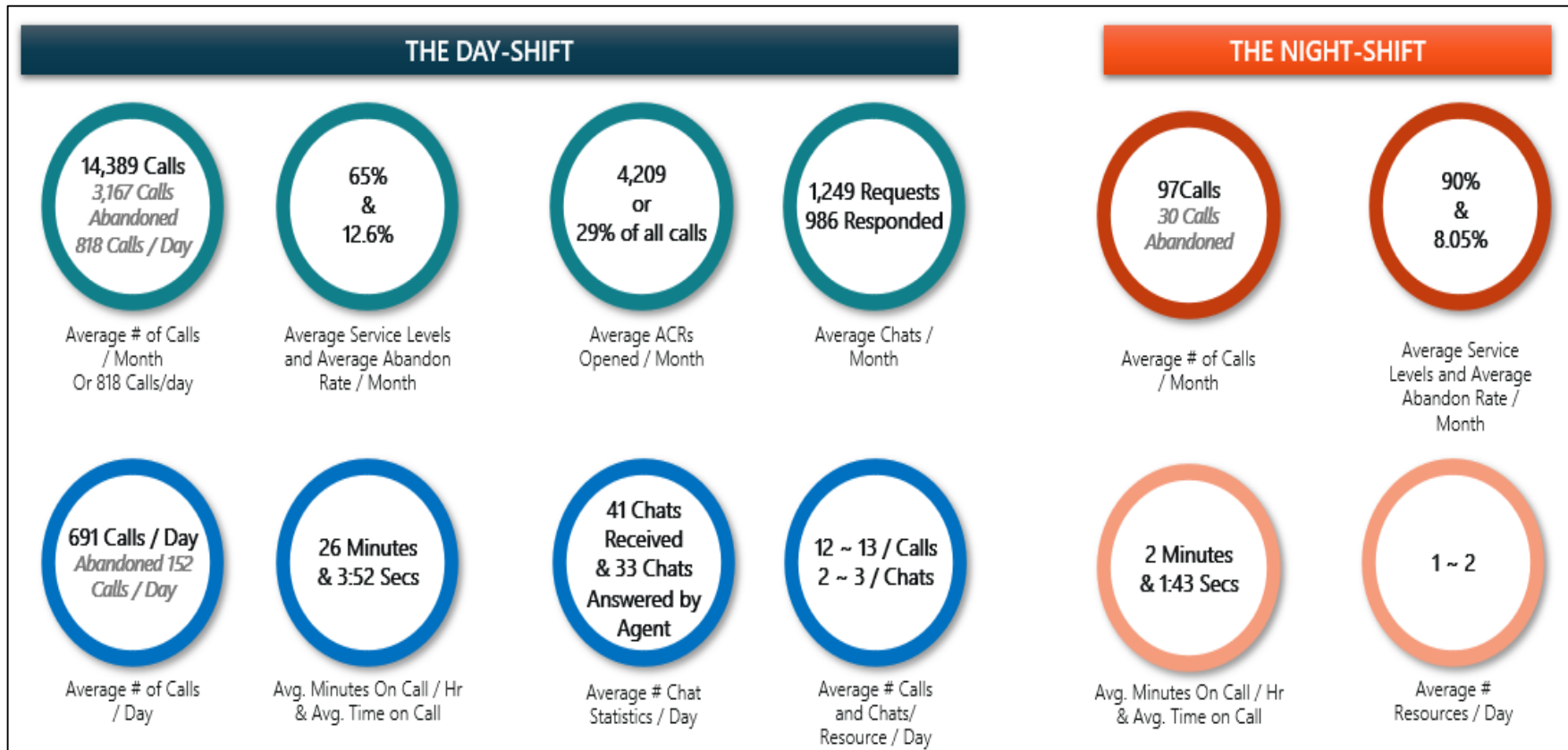
APPENDIX B – BENCHMARKING

Benchmarking Relative to Peer Municipalities

The KPIs included in the listing below were identified with Markham as metrics they would be interested in learning more about from the benchmarking exercise.

No data was available from Markham for some of these KPIs, nor tracked by the City of Vaughan or the City of Hamilton (represented by blank sections in the table below).

KPIs	City of Markham (Jan - June 2023)	City of Markham (Baseline)	City of Vaughan (2022)	City of Hamilton (2022)
% of calls within service level standards		70%	29.58%	
% Calls Abandoned	16.80%		25%	15%
% Calls Handled	82.20%			
Average Talk Time (mins)	3 minutes 56 seconds	2 minutes 40 seconds	2 minutes 48 seconds	3 minutes
Average Wait Time (mins)			4 minutes 42 seconds	1 minute 13 seconds
Longest Wait Time (mins)	3 hours 52 minutes		1 hour 33 minutes	
Team Productivity (calls per FTE/PTE)				
Team on Queue Time				
Personal Break				
First Contact Resolution	85.10%	80%	55%	52%
Customer Satisfaction	4.1/5			
Email Response time	48 hours	48 hours	N/A	48 hours
Chat response Time (mins)	0:35			
Transferred Call Rate	7.55%		45%	

APPENDIX B – BENCHMARKING

Insights from the KPIs and Benchmarks

⊖ Call abandonment rates could be lower
The **call abandonment rate of 16.8%** in the last six months is higher compared to the City of Hamilton **(15%)** but significantly lower than the City of Vaughan **(25%)**. By utilizing technology, such as Explore, CRM, improved Chatbot, and improving resource management, there can be decrease call abandonment rates. This will result in more handled cases, higher customer satisfaction, and improved service delivery..

⊖ Average talk time has increased significantly in the last 6 months
With the **average talk time at 3 minutes and 56 seconds**, there is an opportunity to reduce this to be more in line with the threshold, its internal baseline rate, and its peer municipalities **(under 3 minutes)**. Improved CRM, an improved IVR communication system, and automated status communication of open dockets, may provide insights to reduce the average talk time.

⊕ Performing exceptionally well in resolving cases on the first contact
Compared to peer municipalities, the City of Markham is resolving inquiries without follow-ups at a rate of **85.1%**, trending even higher than its internal baseline rates **(80%)**. Follow-up analysis should be to categorize the difficulties of the different types of cases.

⊕ Transfer Call Rate are much lower than peer municipalities
The **transfer call rate at 7.55%** in the last six months is significantly lower than the City of Vaughan at **45%**. Follow-up analysis could be necessary to understand the discrepancy as there could be many reasons. This could signify that the City of Markham's call centres are responsible for more functions and activities and act less as the frontline directory. Or it could mean that clear procedures and processes reduce the need to transfer calls.

*Markham does not current track After Call Processing, so this metric has been excluded.

APPENDIX C – SWOT ANALYSIS SUMMARY (MNP INSIGHTS)

INSIGHTS FROM SWOT	
BUILD / SUSTAIN	• The Centre's **culture of delivering a positive customer service** experience to Markham residents must be nurtured as new services and tools are introduced. • The team communicated a **culture of collaboration and support** within the Centre, enabling people to support one another in day-to-day activities. • Willingness to **adopt tools, processes, and activities** that enhance the productivity and effectiveness of the Centre.
INVEST	• **Identified tools and technologies**, Explore / MS 365 / and CRM will better manage workload on registration days, facilitate **collaboration and improve case management**. • An **organizational structure that supports and enhances active management, as well as an organization design with team leads,** will also **enhance employee retention**. • **Automating, dynamic scheduling, and dashboard reporting** can boost resource management and expand scope without significantly increasing the manpower budget.
CHANGE	• Discard **the use of disparate systems** that do not connect/or integrate in the Centre as an integrated platform will enhance workforce management, resource utilization, and multi-channel and multi-case management. • Change the existing **resolution management** approach to make the process more structured, formalized and collaborative with other departments to enhance customer experience. • Improve **new CSR training** to build a measurable and self-directed program that onboards teams faster.

APPENDIX D – CAPACITY UTILIZATION & MANAGEMENT
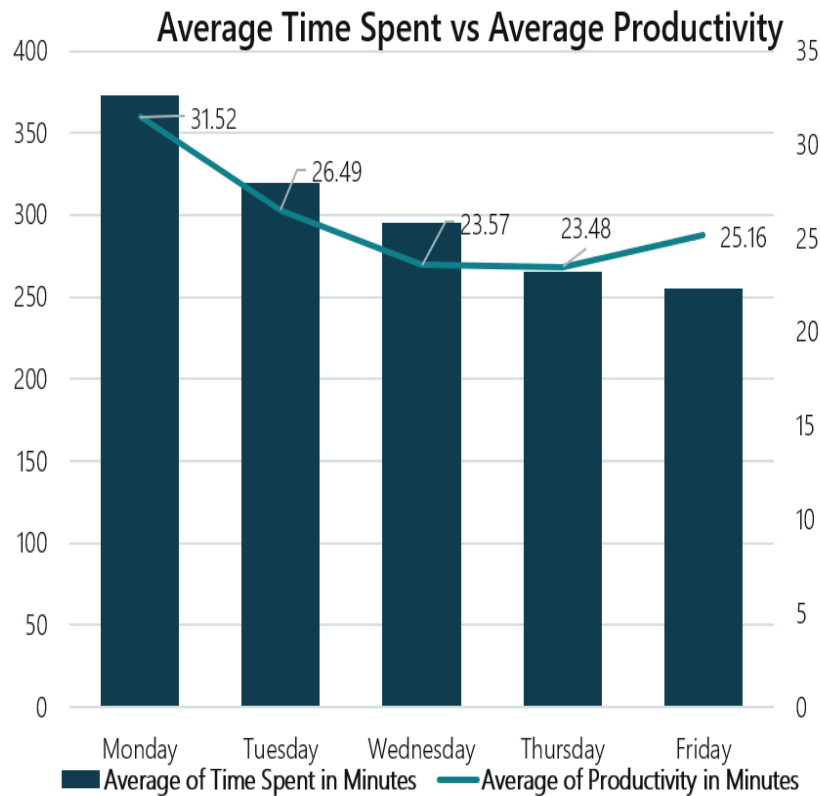
Capacity Analysis – Workload

Average calls received were the highest on Monday and Tuesday respectively. The busiest incoming call periods on both days were 9AM, 10AM and 3PM. However, the largest calls lost were observed at 8AM and 4PM due to low resource allocation. With better scheduling, improved IVR, and new technology adoption these periods may be better managed.
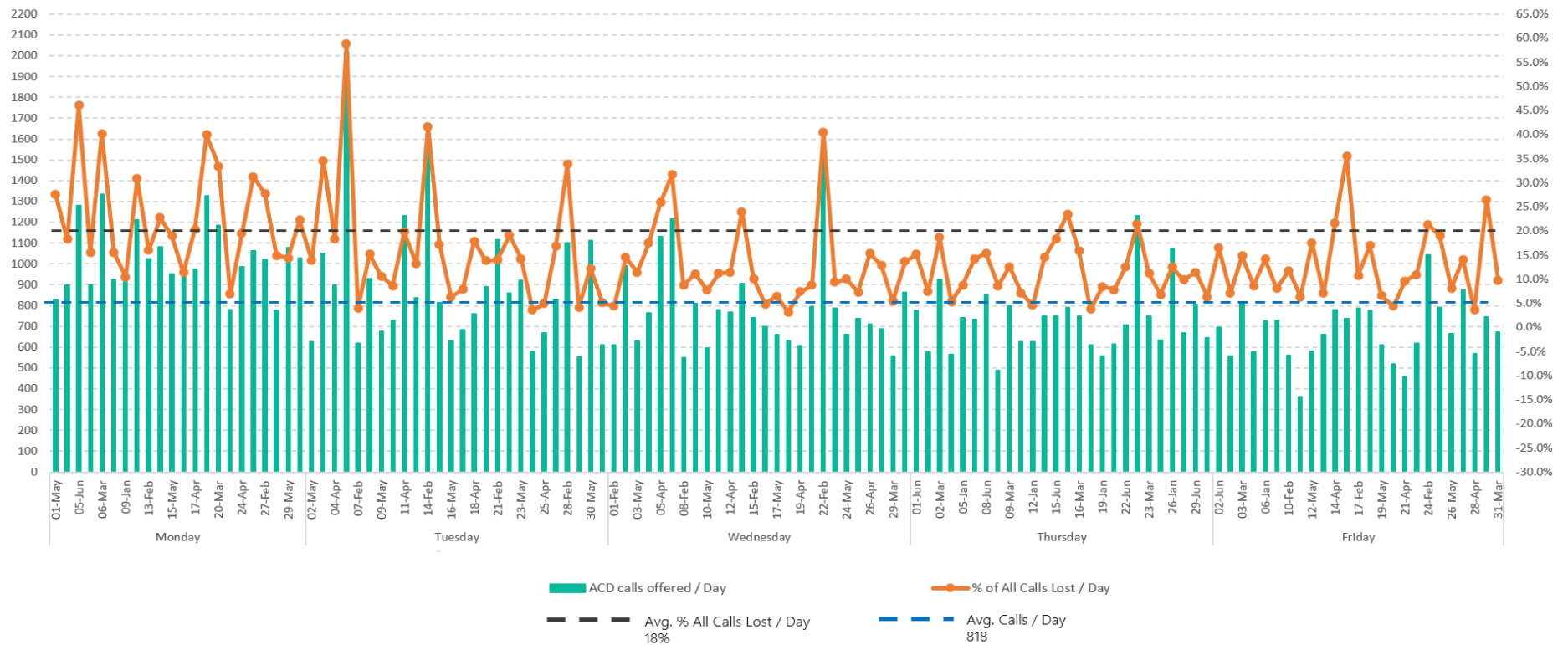
Appendix D – Capacity Utilization & Management

Average Time Spent On-Call Activities

After analyzing the call data, it was found that only 49, or 4.5%, of all 1,115 hourly instances recorded had a CSR busy on-call activities for a period of more than 41 minutes. Conversely, only 20% of all instances recorded had CSRs busy on-call activities between 30 and 40 minutes. Please note, a CSRs productivity cannot be accurately measured on-call or chat-based activities alone, as the current data monitoring routines do not measure time spent on off-call activities.

Average Time Spent vs Average Productivity

Legend: Average of Time Spent in Minutes | Average of Productivity in Minutes

Productivity values: Monday 31.52, Tuesday 26.49, Wednesday 23.57, Thursday 23.48, Friday 25.16

Key Insights:

- The historical data shows on average the productivity of each resource is between 23 and 32 minutes an hour on any given day.

- Whereas Mondays and Tuesdays are the busiest days of the week, the busiest period being the "Morning Hours" from 8 am to ending at 11 am and 2 pm and ending at 5 pm is the next busy period across most days.

- Industry Standards for contact centre would be to structure resources between 63% to 75% of the hour to avoid burnout and utilize an individual's hours.

- If resources are is an opportunity to strategically allocate resources to hit the maximum productivity threshold of 40 minutes per hour.

- Therefore, with greater resource management, dynamic scheduling and use of new tools & technologies, greater capacity utilization can be achieved

- *Approach: Productivity for any given hour was calculated by the time spent on call divided by the number of resources available to attend calls.*

APPENDIX D – CAPACITY UTILIZATION & MANAGEMENT

Capacity Planning with Higher CSR Utilizations

With the adoption of new technologies proposed, enhanced data management across all work activities, specialization and training routines, and improved organizational structure, the utilization of agents across on-call and after-call activities can increase by a level between 60% and 80% per hour, thereby driving greater improvements in resources. Below is a sample of how the number of resources allocated per hour could change, if productivity on call activities was improved.

Average Resource Requirements @ Higher Utilization of 36 Mins / Hr
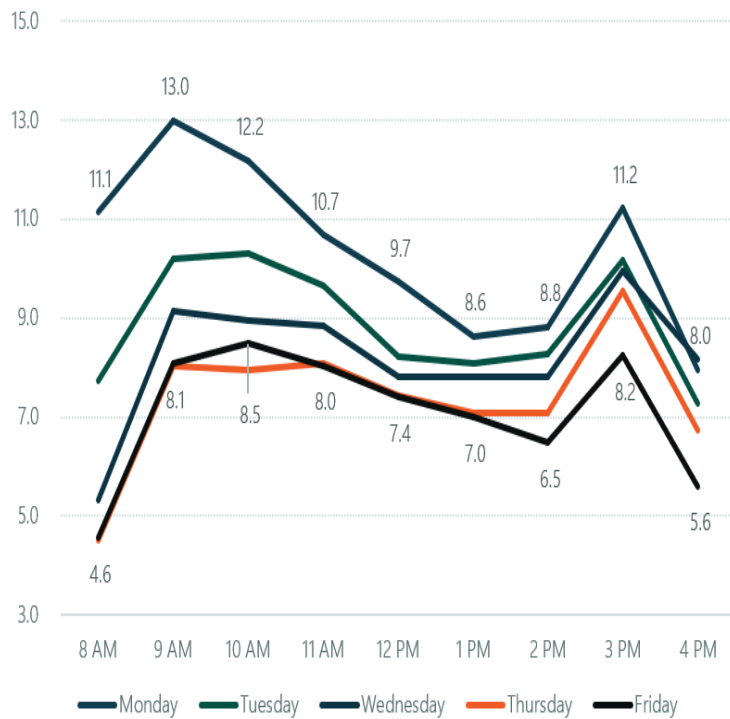
Average Resource Requirements @ Higher Utilization of 40 Mins / Hr

APPENDIX D – CAPACITY UTILIZATION & MANAGEMENT

Key Takeaways

Manage Monday Resources	• Monday is the busiest day of the week with most hours' resources operating at nearly 35mins of the hour. • An improved schedule of resources on Mondays with more CSRs assigned, maybe as many as 11 people, to start at 8AM will greatly reduce call abandon rates from 36% to somewhere near or below 20%.
The Morning	• Excluding the Monday rush of 8AM, if consistently through Tuesday and Friday, the 12 – 13 CSRs are made available by 9AM the team's call abandon rates can reduce from an average of 12% to under 8%.
The Evening	• If 12 – 13 resources are planned to be available between 3PM and 5PM on Tuesdays through Friday, the call abandoned rates can reduce from 17% to under 8%.
Capacity May Exist	• Without monitoring after-call and non-call work times, agent utilization has been primarily driven by on-call activities and customer chat data logs. The estimated time taken to create an ACR log is not expected to impact productivity significantly, with an average of 1.5 cases/agent per day. Additional investments in AI Chat Bot, IVR system, and integrated CRM can create additional efficiency.

APPENDIX E – REPORTING AND KPI MONITORING

Several KPIs that are not tracked which would provide greater insights into the Centre's operations and capacities are:

Relevant KPIs Missing from Tracking Systems	Why are these KPIs important to track?
Average After Call Work (in minutes)	Tracking of the average time it takes after each call or chat to document the call onto the ACR platform. This will help Markham better understand how long it takes to not only answer a call but also to document the call details of the ACR improving capacity optimization and enhancing service level standards.
Team Productivity (calls per FTE/PTE)	Measuring calls handled per FTE/PTE in a given day/week/year would allow for Markham to forecast and plan resources more effectively, taking into account different scenarios and future call volumes.
Team on Queue Time	Tracking the queue time for team members as a whole would allow Markham to extrapolate and understand the total value-added and non-value-added time. This will help to understand the opportunities to reduce queue times and ways to leverage more of your workforce.
Email Response Time	Email response time will help to understand if current service level standards are being met and directly ties into customer service delivery.

APPENDIX E – REPORTING AND KPI MONITORING

Additional Potential KPIs

These additional recommended Centre performance metrics are essential for assessing the efficiency, productivity, and effectiveness of the Centre's operations. These metrics could provide valuable insight into various performance aspects and help to identify improvement areas.

Type	KPIs	
Productivity	• Employee utilization • Department utilization • Average call duration • # of above-average call duration • Average **after-call work** time	
Customer Satisfaction	• Average wait time • # of abandoned calls • # of calls escalated	
Case Management	• # of cases opened • # of cases closed • # of outstanding cases • # of calls miscategorized	
Scheduling	• Schedule variance • Actual vs. target performance • # of call offs	