City of Markham

Contact Centre Review

April 1, 2025

Introduction - Background & Objective

Background

- 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.

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.

Introduction - Scope

Scope

The engagement focused on reviewing the following areas:

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

2. **Staffing Model:** Review of the 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:** Review of the Centre's 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. **Service Levels:** Review of the 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.

The Review was undertaken between July and August 2023, prior to the launch of the Xplor system.

Introduction - Approach and Framework

- In order to conduct the review, 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.

- MNP's detailed report provides an analysis of the frameworks' three elements - People, Process, and Technology.

- This following presentation provides a summary of the identified **Key Opportunities, Recommendations, and Management Responses**.
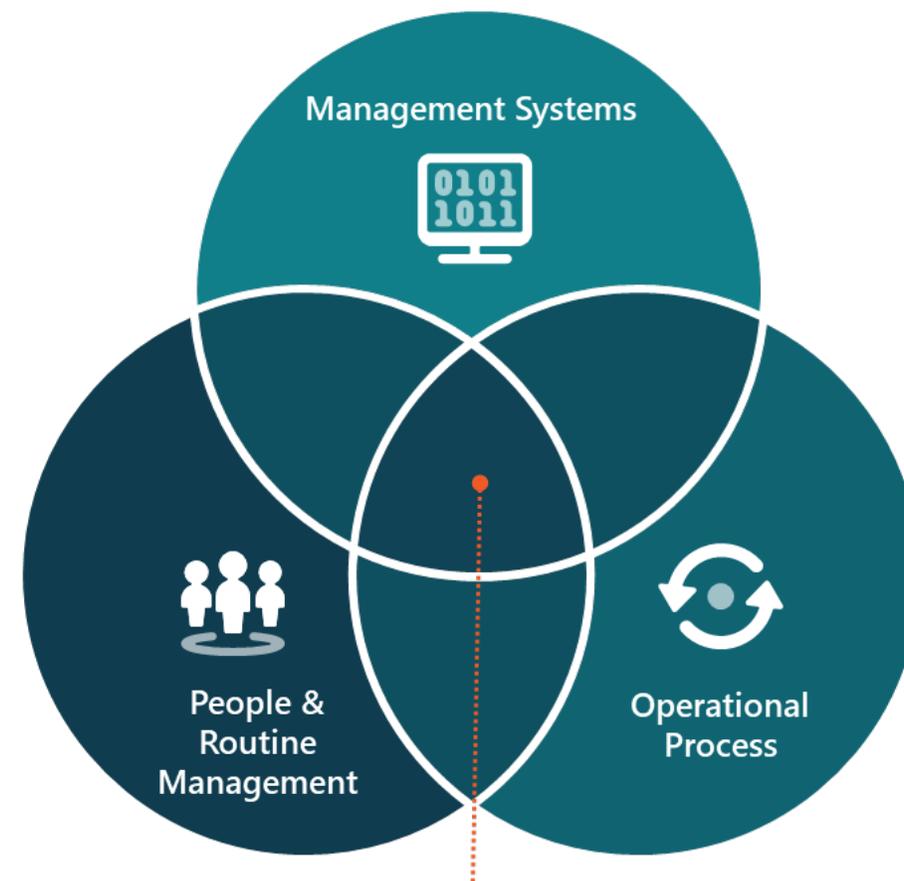
MNP's Business Review Framework

Summary of Key Opportunities for Improvement and Recommendations

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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, enhancing the Centre's strong service levels and drive greater value in the scalability of existing resources.

#	Opportunities and Recommendations for Improvement	Management Responses
1	**Introduce a Team Leads Organizational Structure** The introduction of a formal team lead structure will drive the business to deliver: **Immediate Supervision:** Team leads on the floor can provide immediate supervision, guidance, and support to the CSRs when handling inquiries or complex issues. **Resource Management:** Team leads can be responsible for managing resource allocation, including assigning tasks, distributing workloads, and optimizing staff schedules. **Coaching and Training:** 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. **Quality Assurance:** Team leads can be instrumental in monitoring and maintaining the quality of services provided by CSR. They can conduct regular evaluations, provide feedback, and ensure that CSR adheres to service standards. **Escalation Handling:** 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. **Drive Greater Active Management:** 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.	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.

Summary of Key Opportunities for Improvement and Recommendations

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#	Opportunities and Recommendations for Improvement	Management Responses
2	**New Data Management Systems** A 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: • **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 predefined criteria. • **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. • **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.	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. 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. 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. 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.

Summary of Key Opportunities for Improvement and Recommendations

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3	**Performance Dashboards** 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, 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 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.	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.

Summary of Key Opportunities for Improvement and Recommendations

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4	**Scheduling Software** 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. 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: • <u>Optimized Workforce Allocation</u> with expected call volumes and other operational demands. The tool would ensure that staffing levels match the workload by analyzing historical data and forecasting future needs. • <u>Cost Control</u> to efficiently schedule and minimize cost overruns from overstaffing during low-demand periods and prevent poor performance due to understaffing during peak times. • <u>Real-time Monitoring and Adjustment capabilities</u>, allowing the Centre to track performance and adjust 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.	The City has long recognized the benefits of an effective scheduling tool. Unfortunately, there does not appear to be scheduling software options that fully address operational needs of the City's business environment. 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.

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5	**Phone System with Interactive Voice Response (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 the 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. 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.
	
	Other items to consider include:
	• **Creation of Service Specialists within the CSR Team -** with the use of an IVR system, CSRs could specialize in certain requests, while some could be trained as generalists.
	
	• **Use of Auto Responder Rule -** Auto-Response Rules can further empower the Centre to automate responses to select questions or requests that specific pre-recorded responses can address.
	
	• **Adoption of one of the following Call Back Features:**
	  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.
	  b) **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.
		As the Contact Centre acts as a 'one-stop shop' for Markham's residents and customers, implementing an IVR system would be unnecessary. Since the Contact Centre manages all incoming calls, providing IVR options would only add frustration to the caller experience.
		
		The Contact Centre has tested the automated call-back feature of the existing phone system. Unfortunately, it did not function as expected. We will continue to monitor the marketplace for a suitable tool that meets all of the Contact Centre's needs.
		
		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 the new CRM, customers will have greater opportunity to use self-service with more guidance and user experience. The Contact Centre staff continue to look for opportunities to enhance service with the tools available.
		
		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.

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#	Opportunities and Recommendations for Improvement	Management Responses
6	**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. 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.	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. 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 weather events, or if additional staffing is required due to an increasing trend.

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7	**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. 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.	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. All Contact Centre staff are fully trained to handle a wide range of inquiries. Specializing staff in specific areas is not the most efficient use of resources. Focusing only a few team members on a particular subject, may create unnecessary service delays and backlogs when call volumes are high.

Recommendation

The Auditor General recommends that:

- The Contact Centre Review Presentation be received.

Q&A