



Subject: Access Aurora, Customer Service Quarterly Report
Prepared by: Ivy Henriksen, Manager of Customer Service
Department: Corporate Services
Date: May 1, 2018

In accordance with the Procedure By-law, any Member of Council may request that this Information Report be placed on an upcoming General Committee or Council meeting agenda for discussion.

Executive Summary

This report is a new quarterly report created for Access Aurora to advise Council of activities conducted in this centralized unit during the 1st quarter.

- Collecting and tracking statistical data related to customer requirements assists customer service in identifying potential gaps that may need to be explored for continuous improvement
- The CRM tool is able to provide staff a central point of access for triaging resident concerns and builds in accountability for staff involved in the life cycle of a complaint from start to finish

Background

Access Aurora is the Town of Aurora's customer service hub located at the Town Hall Municipal office. The hub is a centralized customer service model that has been in place since the fall of 2013.

This centralized unit is responsible for corporate cashiering, front line customer interaction, call center telephony, all Town mail and courier activities, road closure applications, various licensing activities, commission requests and the first point of contact for visitors at Town hall.

The unit also conducts various activities in a supportive role for internal customers with all other departments as the needs arise. This can vary from providing data entry

support to account reconciliation and working with corporate subject matter experts to complete municipal service requests.

Analysis

Collecting and tracking statistical data related to customer requests and requirements, allows Access Aurora to identify potential gaps in customer service that can be explored for continuous improvement

Access Aurora is a customer service hub and is able to collect statistical data pertaining to the types of services, volumes and trends experienced in the customer service unit. The trends identified help us as a corporation to determine if we need to improve communication to the public, add a potential resource and better determine staff/public expectations.

In the first quarter of 2018, animal control concerns increased. This is not unexpected due to the fact that the Town of Aurora Bylaw Services division took on animal control in house as of January 1, 2018.

The trends tracked in this new service area assisted Town staff with the development of an improved customer support model. This improved support included better communication both internally and externally, and identified the need for improved relationships with external stakeholders such as Ministry of Natural Resources (MNR), non-profit rescue organizations and animal shelter systems. This helps us as a municipality work towards municipal best practices, raise the bar for service and improve the overall experience.

The CRM tool is able to provide staff a central point of access for triaging resident concerns and builds in accountability for staff involved in the life cycle of a complaint from start to finish.

The CRM tool is used to track service requests for complaints or actions required on behalf of municipal customers. The CRM tool is in its 2nd phase and has the ability to track and manage complaints in specialized subject matter areas. Some of these areas include complaints for winter maintenance concerns/damages, waste management issues, road safety concerns, asphalt/pot hole/curb requests, parking permits, street light outages, parks and trail concerns and several others subject matters related to our municipality.

The CRM tool is able to provide staff a central point of access for triaging resident concerns and builds in accountability for staff involved in the life cycle of a complaint from start to finish.

The CRM tool is able to save photos, emails and resource documents to the individual resident service ticket and has proven to be an asset for identifying trends, managing vendor service levels and assigning available resources to obtain resolution.

Advisory Committee Review

Not applicable

Legal Considerations

Not applicable

Financial Implications

Not applicable

Communications Considerations

The first quarterly report has been reviewed by corporate communications. Future editions may include other statistics and graphics, to work towards an Annual Report if desired.

Link to Strategic Plan

The development of centralized customer service and implementation of Customer Relationship Management supports the Strategic Goal of Developing a Customer Service Strategy and Implementation Plan.

Alternative(s) to the Recommendation

Not applicable

Conclusions

The report has provided an enhanced understanding to Council of how Access Aurora has evolved and the types of transactions included in this centralized unit.

Attachments

Attachment # 1 - Access Aurora First Quarterly Report

Previous Reports

Not applicable

Pre-submission Review

Agenda Management Team Review April 12, 2018

Departmental Approval



Techa Van Leeuwen
Director of Corporate Services
Corporate Services

Approved for Agenda



Doug Nadorozny
Chief Administrative Officer

TOWN OF AURORA

ACCESS AURORA QUARTERLY REPORT

▶ Q1 2018



OVERVIEW

The Town of Aurora's Customer Service division, Access Aurora provides residents and visitors with information on Town services, processes the corporations electronic financial transactions, receives and posts tax and water bills, processes marriage licenses, reports problems and service requests on behalf of the public, sells pet tags, schedules and conducts civil ceremonies in addition to other customer interactions.

The following document summarizes some of the Customer Service activities completed from January 1 to March 31, 2018.

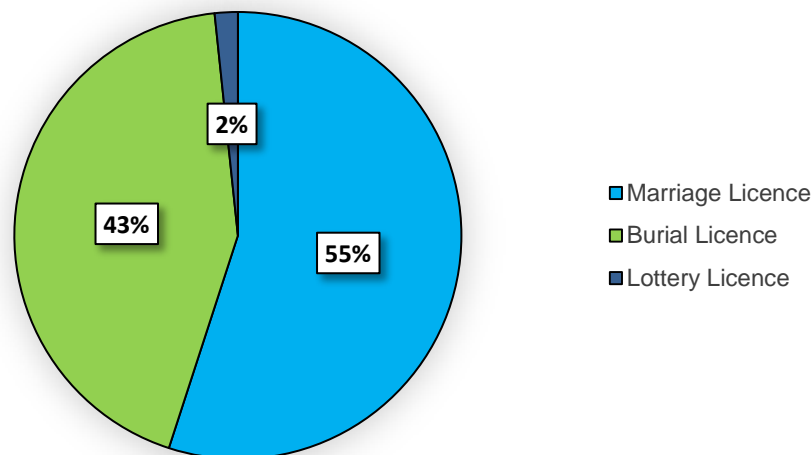
The purpose of this summary is to provide increased awareness of the Customer Service division's ongoing activities and revenue.

In Q1 Access Aurora received **1,249** emails with the majority of them pertaining to inquiries about water and tax accounts, waste and recycling and winter maintenance complaints and concerns.

Access Aurora call center answered **10,461** phone calls. **398** calls were abandoned once they entered the call centre queue (waiting to be answered). Average time a caller would abandon their call and hang up was **20** seconds.

In Q1, Access Aurora issued **60** licenses total. The majority of them being for marriage licenses.

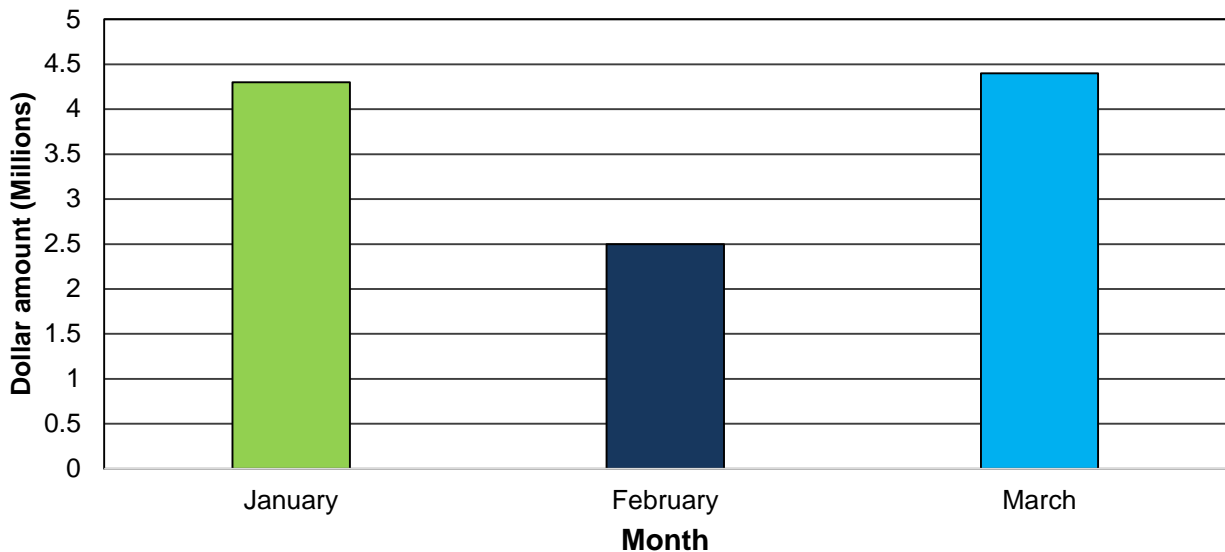
Q1 LICENSE ACTIVITY



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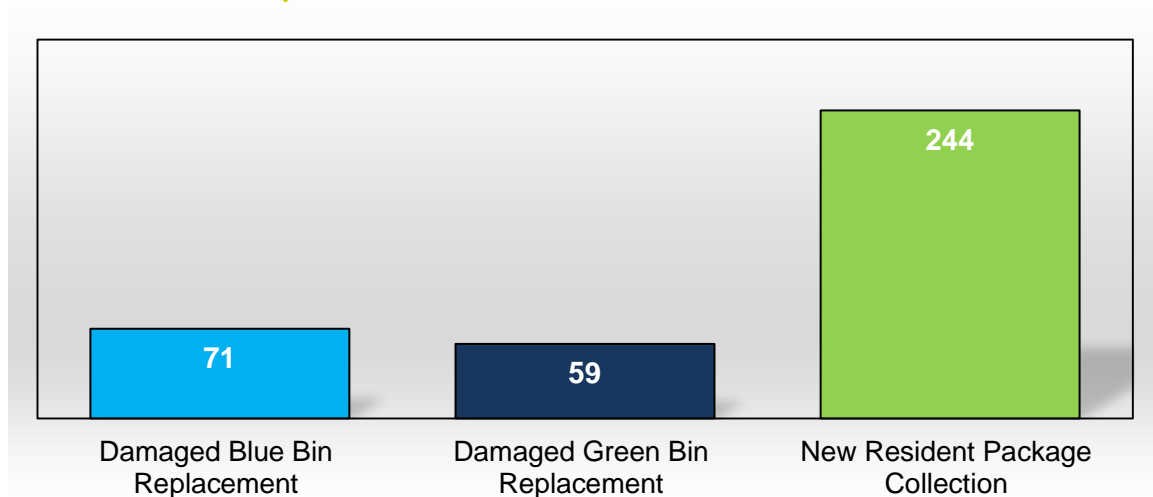
In Q1 Access Aurora processed **\$11.2 million** dollars in revenue generated through property and water payments, licenses, tax and water certificates, waste and recycling bins, property compliance letters, special event tickets and presto passes.

Q1 REVENUE



In Q1 Access Aurora sent out **74 couriers** on behalf of the corporation and distributed **381** waste and recycling bins with **248** of them being new resident packages.

Q1 RECYCLING BIN PROGRAM



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In Q1 Access Aurora sorted and processed **4,286** pieces of mail.

Customer service trends observed in Q1 included high water bill occurrences, animal welfare concerns for injured or sick wild life and an increase in marriage license activity.

CRM DATA

Access Aurora are regular frequent users of the CRM tool. The CRM tool is also used by subject matter experts across the corporation. Currently we have approximately 40 CRM licenses assigned to staff within the Town of Aurora. This number is expected to increase by the end of 2018.

CRM has been useful in tracking service requests and being able to follow the customer service request life cycle from start to finish. There are over 100 different options for service tickets and they are unique to each business unit. Most departments have several sub-categories available based on their most common concerns and complaints.

When options are selected in the CRM the system assigns a priority code. These codes were set up in the design stages of the CRM product and were in consultation with division municipal managers as low, medium or high priority. The priority code also populates a due date. This allows us to prioritize safety concerns in the system. For example; vandalism or broken glass in a park would be triaged as a high priority and this division would receive the ticket with a due date of same day.

To date we have been able to populate over 5000 individual resident cards. On a daily basis, new residents are being added to CRM when the resident starts their relationship with the Town of Aurora. A residents first interaction with us is usually of a positive nature, due to them moving into a new home, setting up a new water or tax account, arranging for pre-authorized payments, retrieving their waste calendar or new recycle bin, etc. Having the resident card set up at this time has been beneficial and establishes a relationship with them should they require service or need to complain or add concerns in the future.

Open CRM service tickets can be by a myriad of topics and range from street light outages, vandalism on a trail, to a special parking permit request. Tickets created on behalf of customers are assigned in the system and then triaged to the appropriate staff member in the department responsible for the municipal service transaction. The staff member or subject matter expert is able to track steps within the service ticket until a resolution is complete. This allows for full life cycle accountability.

At the end of March we had 540 service tickets open across the corporation.

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The CRM is a tool that can help staff manage their own service tickets in addition to their team's tickets. A corporate wide dashboard is also available to the customer service manager and includes the number of cases created, type of subject matter, priority codes (high, low, normal), staff involved, and cases due in the next 7 days.

CRM has the ability to house and create data and statistics that can then be shared and exported for reports in Excel or Word documents.

For example – The CRM data has been very useful in managing seasonal service complaints related to winter maintenance. This has been useful when navigating Town responsibility versus vendor responsibility throughout the season.

See sample below of winter related statistics for 2017/2018 season captured in the CRM.

Category	Number of Complaints/Concerns
Windrow Concerns (Service level concerns, wanting windrow removed, chunks of ice in windrow, etc.)	14 *1 of 14 referred to Neighbourhood Network
Sod Repair (Damaged by sidewalk or road plow)	37
Driver Behaviour (Road and Sidewalk) (Driving too fast, wrong way on street, alleged rude behaviour, etc.)	10
Concerns for Sidewalks (Sidewalk not cleared yet or in time for school, icy sidewalk, sidewalk missed, etc.)	24 *1 of 24 referred to Canada Post for CMB concern
Concerns for Roadways (Road not cleared yet, road missed, road icy, regional road missed, etc.)	44
Personal Property Damage/Complaints (Damaged by TOA road plow and/or by vendor sidewalk machines)	14
Total complaints Q1 for 2017/2018	143 Total Complaints

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CRM provides an overview of what is happening corporately in our complaint management and can sometimes help us 'tell the story' where we need to work towards continuous improvement and/or if there is a situation that needs immediate attention.

As we move forward with our CRM tool we will be able to engage more staff, determine more process maps and work flows and continue to build in accountability and resolution for all involved.