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City of Winnipeg
Final Report 311 Project
311 Business Plan

June 30, 2006

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EXECUTIVE SUMMARY

Overview

The City of Winnipeg embarked on a project to prepare a Business Plan to address the implementation of a 311 Made-in-Winnipeg model of Customer Service in response to the Red Tape Commission recommendations related to the elimination of red tape and the improvement of customer service. The Council approved recommendations included:

- That a 311 Model of Customer Service be adopted for the CoW
- That a detailed Business Plan be prepared, with the assistance of an external consultant, to address the implementation of the 311 Model of Customer Service with options regarding the scope of the initiative and associated costs and benefits
- That the Administration report back on the results of the Business Plan by June 2006 with recommendations for moving forward
- That the proper Officers be authorized to do all things necessary to implement the intent of the foregoing

In parallel to this activity the City also sought to determine whether the City could realize cost savings and increased Citizen satisfaction through the implementation of a 311 system.

Study Objectives

The primary objective of the study was to provide a Business Plan to address the implementation of a 311 Model of Customer Service. The City also required that the detailed Business Plan contain the following components:

- An assessment of the current state including challenges and opportunities: In this document we have reported on the City's current cost/call minute, number of calls, average handle time, service level and quality assessment as part of the current state assessment. In addition, the magnitude of change management required (challenges) and the possible benefits (opportunities) are included
- 311 options and costing: We have provided detail on the various 311 models from a "take and transfer" (e.g. switchboard) to a full service consolidated delivery model are explored. In addition, delivery options such as outsourcing, virtual consolidation, and full consolidation are discussed. Operational details regarding various technical solutions, hours of operation, required staffing and space are included, as well
- An implementation strategy: The implementation plan provided provides detail on
  - 311 Requirements: Requirements to achieve 311 such as, high level costs and technological requirement
  - A Migration Plan: Detailing how to move forward, including, key initiatives, a change management and engagement strategy and key components of a communication plan
  - A Training Plan: This addresses who requires training, when and what will they be trained on. Backfill options for staff being trained is also explored (so as not to create service delivery gaps during training)

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Findings

There is no question that opportunities exist to significantly enhance Citizen service while realizing benefits not otherwise achievable through conventional productivity improvement initiatives. The City of Winnipeg has worked hard to obtain their current level of service, effectiveness and efficiency at their existing call environments. Nevertheless, there are still significant opportunities for improvement through a more aligned and synergistic consolidated call centre environment. Numerous municipalities across the USA have already achieved remarkable results through 311 initiatives. In Canada, progress has already been made in 311 call centre environments and further enhancements and improvements are planned. Significant advancements in Citizen service and efficiency have been made and reported through the consolidation of call centre operations at all three levels of government, all with the view of making it easy for Citizens to interact, be involved and do business with the City.

This is not an initiative that can be done in a piecemeal fashion, one Department or call centre at a time. It would be extremely time consuming, costly and the maximum level of improvement could not be achieved. Improvements in service levels can only be achieved through the synergistic implementation of a three digit Citizen entry point (311), consolidation (to achieve the required economies of scale), process reengineering and an investment in process, people and technology.

Our 'Current State' analysis shows that significant operational efficiency can be achieved. AtFocus used four independent methodologies to validate the savings opportunities. Each concluded that improvements to Citizen service can be gained and each independently concluded that there are efficiency savings to be had. More specifically:

- Using available costs of operation and current call volume statistics, the City on average operates at Cost Per Call Minute (CPCM) of $1.13-1.31, comparing this to a leading practice $.40-.60 (representing staff operating costs only). The total cost of "Calls Answered" is between $5.4-6.3 million. This number does not include costs for accommodation, technology, telephony, or supervisory/management staff, training or other associated costs of providing service. A 30%-40% adjustment must be made to this number to get a truer picture of total costs. As such it can be estimated that total estimated cost of calls answered is between $7-8 million annually. This could translate to a significant operational improvement depending on which call centres are consolidated into 311
- Our proprietary Call Centre Diagnostic tool concludes that the City of Winnipeg scores an efficiency score of 2-2.5 where leading practice is a 5. Moving to a 5 could result in about a 40-50% efficiency savings and significantly improve Citizen service
- Our proprietary Quality Monitoring and Coaching Scorecard which demonstrated a number of areas that call quality and call management could be significantly improved resulting in a lower call handle time and decrease in volume of calls
- Applying the Hills Turbo Call Centre Calculator (an industry accepted call centre staffing calculator) to the overall volume and distribution of calls, we found that by consolidating call centre services, the City could reduce staffing significantly

The added benefits from a 311 system fall into the following categories:

- Enhanced Citizen Service
- Improved City Management and Accountability (Enhancing the capability of viewing the City from a Bird's Eye View)
- Enhanced/Simplified Technology

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- Revenue Enhancement Possibilities

Enhanced Citizen Service

With the introduction of 311, from a qualitative perspective, Citizens will experience:

- One easy number to remember and dial: Eliminating the need to figure out where to call by searching through the blue pages, the City web site, correspondences, bills, etc.
- Improved accessibility: Fewer occurrences of "blocked" (busy signal) calls without adding staff
- 24/7 availability: Extended service hours to ensure Citizens can access services at their convenience
- Enhanced service delivery: Opening additional/enhanced service channels will be easier and more efficient with newly documented 311 processes
- Ease of obtaining status updates on all service requests across departments
- Consistent service levels each time the City is contacted: A Citizen will no longer experience varied levels of service when contacting the City
- Improved Citizen "wait experience": When a wait for service is necessary, Citizens can listen to valuable information on current or upcoming City events such as the Census, Prince of England Visit.

Improved City Management

Many of the Cities that have implemented 311, report that significant benefits have been derived through increased attention to the statistics generated from the 311 centre. As a result of monitoring available statistics, Cities have been able to more rapidly address issues affecting City safety and improve efficiencies. Additional benefits to be derived include the ability to:

- Position the City as a single voice to the community
- Provide information that is more accurate and timely
- Address "peaks and valleys" city-wide
- Harness synergies from utilizing the same technologies across the organization and view the City as a whole, enabling improved resource allocation decision-making
- Obtain performance data for performance measurement and 'First Indicator' alerts

In addition, the City will be in a position to manage growing service demands/challenges without additional staff. These demands and challenges stem from the:

- Aging population
- Decrease in funding at the City level

Enhanced/Simplified Technology

The City has a decentralized approach to purchasing and deploying Departmental specific technology. Not surprisingly, the City has many local technologies that support the Departments with their work. In moving to a 311 consolidated model, technology would be standardized for 311, making many of these legacy systems obsolete.

Revenue Enhancement Possibilities

Lastly, the City may be in a position to enhance revenue in the future, with the 311 program. This could come in potentially three areas:

- Maximize City Programs: The 311 program will acquire the technical ability to redeploy resources to conduct outbound activity (calls, e-mails or fax) when inbound calls are low.

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Outbound calls can be used to ensure City program occupancy is maximized (ongoing and one-time events) and that all revenue generating activities are up-to-date or secured for the future (i.e. licensing/permit requirements).

- Extend 311 Services: The 311 program can be extended on a fee for service basis to surrounding municipalities/cities or other levels of government (provincial/federal). Having an easy-to-access number will most likely entice Citizens to call 311 for other levels of government services/information
- Become an Outsourcer: Other levels of government, even possibly the private sector, can outsource short term call centre requirements to the 311 program. It is not unusual that a ready-to- serve call centre be required on a short term basis for a special event, a significant or urgent public communication in an emergency situation (i.e. providing information to Citizens on a new provincial program for two months, providing information for a major conference sponsored by the private sector)

Business Model Details

The 311 model, recommended by AtFocus and supported by SMT and the Project Advisory Committee (PAC) is a single consolidated call centre.

In this Model, all Citizen contacts would enter into a 311 Centre which is consolidated into one physical site (unless there is a specific documented exemption applied to a group of calls for a limited time period). The 311 Centre would be a 24x7 operation that would handle phone, email, fax and web related to any telephone service requests that 311 handles fully. All contacts, general enquiry and Departmental specific contacts would be handled by the 311 Centre. If a Departmental specialist is required, the contact would be transferred to a specialist in the required Department. An IVR would facilitate call routing and allow for more efficient call allocation. IVR selection could be by categorization of call type (e.g. missed waste pickup, complaint, city special events) in order to be transferred to most skilled CSR for that request (skills based-routing could be activated). The 311 Centre would operate on the principle of "one and done", using "universal" CSRs (e.g. all CSRs take all calls), with some specialty skilled CSRs still existing. 311 would directly link to dispatching of work/repair requests.

Risks & Mitigating Strategies

The move to 311 and a single consolidated call centre will have a significant impact on current operations and will require critical change on the part of the City to be successful. Not only is the front-facing organization changing through consolidation, but the internal governance, interdepartmental relationships and inter-call centre relationship will be affected. In the Report that follows we provide a list of issues that should be considered and offer up possible strategies to mitigate the effects of the migration issues on the success of the 311 initiative. The identified migration issues can be categorized into three main groups:

- Workload: These issue deal primarily with Departmental workload or the anticipation that 311 will not be able to handle the workload
- Service Quality: These issues deal primarily with concerns that quality and accuracy of service will decrease as a result of 311
- Change Management: These issues deal with staff resistance, barriers to change and 311 implementation considerations

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In order for 311 to be successful, significant senior staff commitment is required and strong City-wide co-operation must be in place. It must be recognized that moving to this operational level and achieving full benefit is not an overnight journey. It requires extensive investment in people, processes and enabling technologies, strong leadership, and most importantly, a common City-wide vision and roadmap.

To achieve the improvements described, some basic and fundamental changes are required in both process improvement and technology introduction and enhancements. In the Report that follows, we highlight and address some of these most significant challenges and propose an appropriate implementation strategy to address these.

Recommendation

1. That the Business Plan be adopted and endorsed
2. That the City proceed to the next Phase, that being the preparation of a Business Case for a consolidated 311 environment

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INTRODUCTION

The City of Winnipeg initiated a project to prepare a Business Plan to address the implementation of a 311 Made-in-Winnipeg model of Customer Service. The Business Plan was proposed as a means to determine whether the City could realize cost savings and increased Citizen satisfaction through the implementation of a 311 system. This need for this Business Plan was prompted by the Red Tape Commission.

"The Red Tape Commission was all about improving service and cutting red tape for our Citizens. A 311 system will be a huge step in that direction. 311 provides the best possible service to taxpayers – period. Why bog people down with over 500 different phone numbers when one will do?"

Mayor Katz, November 4, 2005

Public sector organizations are facing significant challenges in their ability to develop and manage quality relationships with their customers while maintaining efficiency and adhering to budget constraints. There is a need to ensure a high degree of customer satisfaction while at the same time striving to improve operational efficiencies and manage service delivery costs. This is difficult to achieve without new approaches and a willingness to change, yet, this delicate balance is one of the greatest challenges the public sector faces today.

The manner in which a City structures (through the establishment of a 311 system) and locates its customer service operations is extremely important in ensuring that service can be provided in an efficient and fiscally responsible manner. Private and public sector organizations are finding that consolidation can result in a positive Return on Investment (ROI), improved efficiencies and increased quality of service. However, prior to uprooting its organization and changing the way in which a City delivers services, a Business Plan, including an implementation plan for a customer centred 311 system must be developed in order to define the value proposition for both the City and Citizens. That is also the challenge for the City of Winnipeg (CoW). Currently CoW provides Citizen service through a decentralized, and at times silo'ed service delivery network of multiple call centres, together with two information lines (Planning, Property and Development and Insect Control). According to the Red Tape Commission Report, customer service (telephone) access points for City of Winnipeg services include more than 600 phone listings in the City of Winnipeg Service Guide (MTS "blue pages").

The stage has been set for CoW to take the next step in moving towards 311. The Red Tape Commission Report set out the following recommendation (Recommendation 25):
"Report to Council on the merits of a full transition to a 311-based customer service model, with the goal of obtaining a final Council decision on the City's 311 service objectives as soon as possible"

This recommendation was taken to Council and approved on November 23, 2005, as follows:

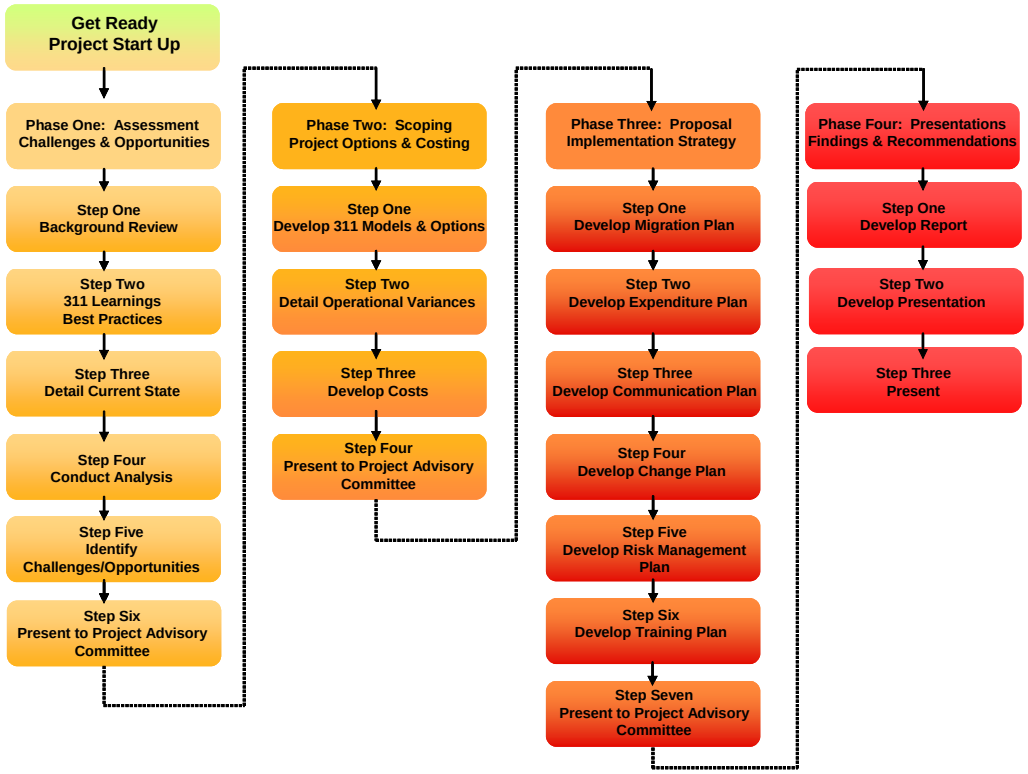
- That a 311 Model of Customer Service be adopted for the CoW
- That a detailed Business Plan be prepared, with the assistance of an external consultant, to address the implementation of the 311 Model of Customer Service with options regarding the scope of the initiative and associated costs and benefits
- That the Administration report back on the results of the Business Plan by June 2006 with recommendations for moving forward

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- That the proper Officers be authorized to do all things necessary to implement the intent of the foregoing

Project Methodology

AtFocus used a four phased approach, illustrated to the right, to develop the required Business Plan. Our approach was as inclusive as possible within the required timelines and allowable scope. We have shared all data gathering templates, findings and Service Request Maps (SRMs) with each of the respective call centres as they were developed. Each call centre was given the opportunity to review the data and where appropriate, adjustments to the data were made to reflect the current state of each call centre. All templates and SRMs were then signed off by the Departments involved. In addition, we presented our findings of the current and proposed future state to the Project Advisory Committee (PAC) and the Senior Management Team (SMT).



The first step of our Four Phase approach allowed our team to become familiar with the City's current day service delivery model, determine the service statistics and conduct an analysis on the current state. We gathered information from existing call centres, completed our proprietary Call Centre Data Profile, conducted a Citizen Experience Program, conducted interviews and focus groups. We also gathered available current-day data from existing reports [i.e. Automatic Call Distribution (ACD) and Enhanced Call Processing (ECP) reports]. This data provided the foundation for the analysis of the possible Business Plan for 311. Our second Phase was to develop 311 models including the cost to implement. This Phase also include drafting 'current day' service request maps (SRMs) for all Citizen incoming calls. Phase Three detailed the implementation plan for the recommended model, and Phase Four was the development of the final report and various presentations.

Our approach resulted in:

- 24 site visits to Call/Service Centres
- 63 management interviews
- 9 focus groups with over 30 participants
- 27 Side-by-Side Sit-ins with frontline staff

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- Listened and assessed quality and call handling on 200 calls

To conduct our analysis of the current state and possible 311 Business Plan we used the following:

- AtFocus Call Centre Diagnostic Wheel
- AtFocus Quality Monitoring and Coaching Scorecard (QMCS)
- AtFocus Call Centre Data Profile
- AtFocus Call Centre Assessment Tool
- AtFocus Operational Cost and Optimal Call Centre Calculator
- Hills Turbo-Tables (to assess staffing requirements under different scenarios),
- AtFocus 311/Consolidated Call Centre Filter

Report Overview

This report presents our findings and recommendations on the 311 Business Paln for the City of Winnipeg (CoW). The report presents a summary of the current state, an analysis of the current state using various proprietary tools, six possible 311 models and an implementation plan that corresponds to our recommended 311 Model, one which involves the consolidation of the majority of service requests being responded to by the CoW. The report is presented in five sections that deal with the following topics:

- 311: What is it?
- City of Winnipeg Current State
- 311 Models
- 311 Benefits
- Transitioning to 311: The Implementation Plan

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311: WHAT IS IT?

311 is a centralized telephone number for non-emergency municipal services. It is an effective means to improve Citizen access, enhance customer satisfaction and achieve operational efficiencies. Municipalities that have implemented 311 recognize the importance of creating an efficient and effective consolidated environment, supported by improved processes and technology (with particular attention to knowledge management, measurement and routing and tracking competencies). A key lesson is that significant attention must be paid to change management through visible senior management and political support throughout the entire organization.

In November of 2004, the CRTC ruled that the 311 exchange could be used in Canada for non-emergency municipal services. Highlights of the CRTC Ruling include:

- 311 to be assigned for access to non-emergency municipal government services
- Telecommunications service providers are to assume the costs of basic switch modifications and network changes
- Call routing should be based on exchange boundaries, unless otherwise negotiated
- 911 and 311 should not be integrated
- Municipalities implementing a 311 program must undertake a comprehensive and effective public awareness campaign

In reaching the ruling, the CRTC concluded:

- That a N11 code would help facilitate effective and efficient communication between municipal governments and their Citizens
- That 211 and 311 services would complement each other effectively, but would be distinct,
- That an easily remembered 311 service would greatly assist the public in accessing municipal services
- That *Blue Pages* may not be useful if callers are unfamiliar with the structure of municipal governments
- That a significant reduction in 911 calls has occurred in those US cities where 311 has been introduced. It is in the public interest to relieve stress on the 911 system

The approved 311 services fell into three main categories:

- **Service Response**: Road maintenance, traffic light/street light outages, water main breaks, garbage/recycling queries, basement sewer back ups, development and building permits/approvals, animals running loose, water quality/safety queries, transit schedule queries, abandoned vehicles, police and/or fire non-emergency services
- **Transactions**: Property tax bill inquiries, business licensing process, ticket payments/inquiries, recreation facility schedules, booking municipal facilities and arenas
- **General Information**: Mayor's Office and City Councillors referrals, general service complaints/compliments

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311 may be one of the most, if not the most significant 'change' project ever undertaken by Canadian municipalities. 311 offers significant change management opportunity and challenges, changing not only customer service and business processes, but also the overall governance of City services and public accountability. The horizontal management of City services and the realization of end-to-end accountability for Citizen service is often spoken about but not often practiced or realized. Successful 311 implementations demand this horizontal accountability. 311 establishes a new end-to-end service delivery partnership throughout a City significantly improves the relationship between the City and its Citizens and enhances the internal service and administrative accountabilities within a City. AtFocus predicts that in years to come, 311 will be looked upon as the single most influential change agent for municipal service delivery.

Opportunities and Improvements

311 implementations across Canada and the US have proven that opportunities exist to significantly enhance Citizen service while realizing benefits not otherwise achievable through conventional productivity improvement initiatives. Numerous municipalities across the US have achieved remarkable results through 311 initiatives. In Canada, significant advancements in Citizen service and efficiency have been made through the implementation of 311 and the consolidation of call centre operations.

Over the past few years, cities such as Calgary, Ottawa, Windsor, Gatineau, New York, Baltimore, Chicago, and LA, to name only a few, have determined that the most efficient manner to manage and serve their Citizens is through the establishment of 311. Generally, the establishment of 311 has five purposes:

1. To provide a single, easy to remember entrance point for Citizens into City services so Citizens have no doubt where to call
2. To provide the City with credible, valuable, and timely decision-making data that is easy and inexpensive to maintain. This data can be used for making strategic and operational decisions related to where budget cuts would be most acceptable, where re-allocation of resources should take place and what Citizen reactions to policy/program change announcements are
3. To invite and encourage Citizens to assist in the overall management and maintenance of the City. Many large and growing cities have recognized how moving to a single number can facilitate the seemingly impossible task of providing excellent services and maintaining safety and quality while keeping costs reasonable. They have done this by making it easy (through one central number) for Citizens to call with information that contributes to the management and maintenance of the City (i.e. where a street sign has fallen, major pot holes, minor emergency situations that do not warrant a 911 call, etc.). Encouraging Citizens to help manage the City reduces overall operational budgets, improves overall service, and improves the City by making it a better/safer place to live
4. To protect the emergency nature of 911 by significantly reducing the inappropriate use and reliance on 911
5. To maximize the inherent economies of scale of a consolidated call centre and achieve significant operational savings

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Lessons Learned

There are a number of lessons to learn from those that have implemented 311 or have consolidated their call centres. These seven key lessons should be carefully reviewed prior to implementation:

- Establish Commitment
  - Ensure that commitment exists at every level; from political to business/operational
  - Involve senior management, business unit experts, and all operations
  - Grow understanding and involvement throughout the organization
  - Create a clear separation of what are Corporate City wide investment costs (e.g. VOIP) and required investment costs to establish 311
- Document current business processes and organizational intelligence
  - Document Citizen service requests and identify where they should change to improve service to the public
  - Future Service Level Agreements (SLAs) and business process rules must be developed
- Do not underestimate change management considerations
- Consider implementation carefully
  - A dedicated team, phased approach and realistic milestones are necessary
  - Adequate resourcing (budget and people to implement) is available
  - Consider speed of implementation. Ensure speed does not overburden the business units but at same time does not result in a loss of momentum
  - Develop a change management plan that includes an effective and ongoing communications plan. Do this early in the process to better manage expectations and mitigate risks
- Before "going live" with 311, ensure enabling supports are available. Detailed consideration should be given to:
  - Required technology
  - Training and effective communication
  - A comprehensive, easy to use, accurate knowledge management system that is effectively supported by the business units
  - Key skills and experience required by agents, supported by a formal training program
- Establish a process to measure success. Determine a baseline measurement prior to launch, in order to be in a position to measure success

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CITY OF WINNIPEG CURRENT STATE

The City's call centre staff are committed to success and the delivery of quality services to the Citizens of Winnipeg. There are enhancements that can be made in areas of Citizen service and efficiency; however, to gain these benefits one centre at a time would be extremely time consuming, costly and the maximum level of improvement could not be achieved. Improved service levels for the Citizens of Winnipeg can only be achieved through consolidation (to achieve the required economies of scale), and an investment in process, people and technology.

This section presents the findings from the data gathered through:

- 24 Site visits, with 30 sit-ins
- Completion of 24 Call Centre Data Profiles that addressed:
  - Current practices
  - Performance and call standards
  - Operating Statistics
  - Current process documentation
  - Call flow
  - Staffing counts
  - Current and planned future investments
  - Quality processes
- 10 focus groups, with over 30 participants
- 27 management staff interviews involving 73 participants
- PAC and SMT feedback
- Review of available data from existing/available automated reporting capabilities
- Completion of a Citizen Experience Program (CEP): 200 Citizen calls were listened to from various call centres. The purpose of the CEP was to check for consistency of response across the City. (Please note: this would not be an adequate sample if a true assessment of quality was to be measured)
- Development and validation of 288 Service Request Maps (SRMs), involving in excess of 60 site visits and interview/discussions with call centre staff

Call Centre Diagnostic Wheel: Results

The AtFocus Call Centre Diagnostic Wheel formed the basis for collecting and organizing the data into significant groupings to assess call centre service delivery. The diagnostic looks at four areas of focus that are closely aligned with call centre basic principles for high efficiency and effectiveness in a public sector environment. In the Current State Assessment step of our work, each of these areas were analysed to assess current state relative to our maturity index. The four areas of focus in the diagnostic are:

- Citizen Focus: representing the relevance of the service offering with the customer and Citizen
- Service Focus: dealing with components of service delivery
- Operational Focus: addressing the quality, efficiency and effectiveness of the service offering
- Strategic Focus: addressing the strategic elements which the call centre should operate within

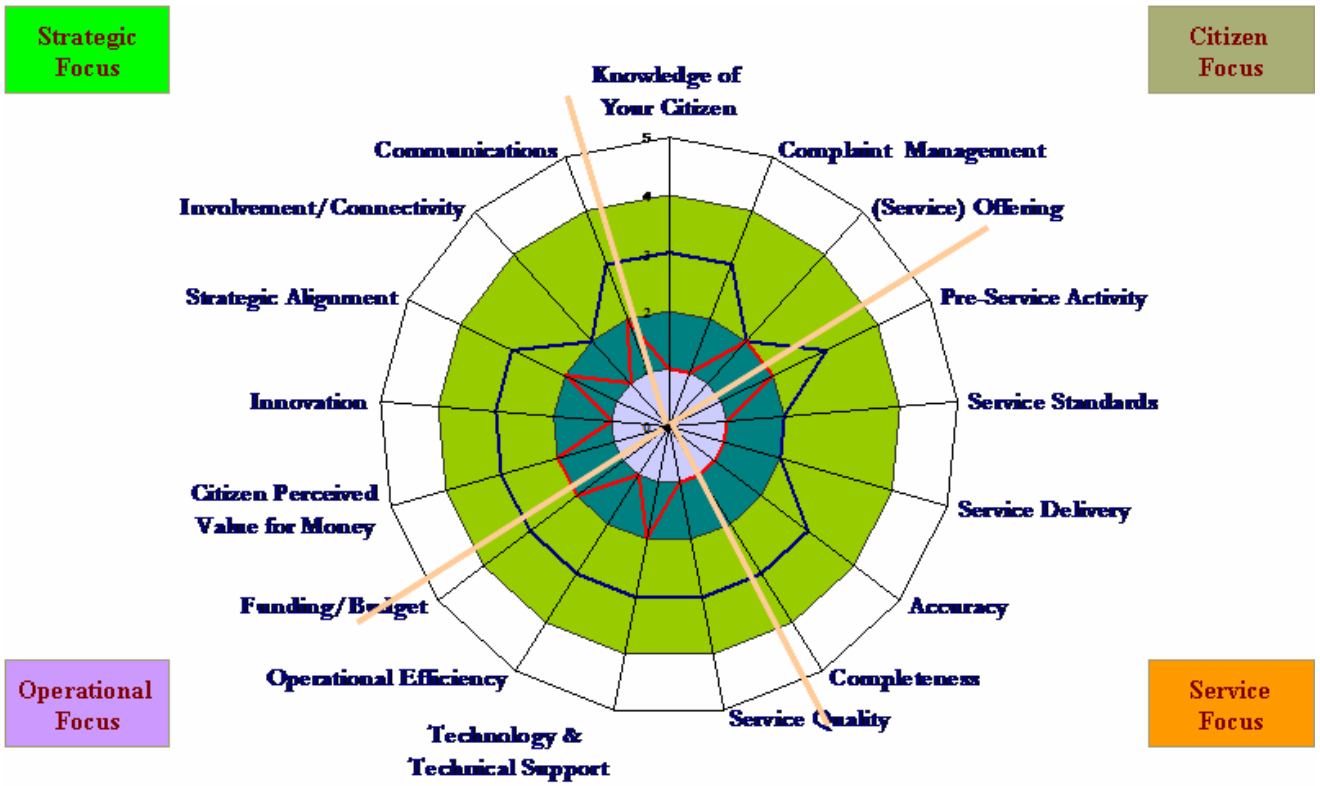
In our review, we were able to distinguish two groups of call centre environments: Type A and Type B. Type A is characterized as having a higher level of technology in place, having and using ACD reports, greater use of performance statistics, and operating as a more formal call centre

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environment. Type B is characterized by a greater use of manual processes and tracking, less telephony technology in place, and typically lower performance levels (Average Speed of Answer [ASA], blocked calls, etc.) or little performance management data.

This tool assisted with determining the level of functionality in each of the current call centre environments. The outcome provides a description and comparison of the call centre current state to the leading practice state. The results are represented through a "spider diagram", which is included on the following page. Type A call centres are shown with the BLUE line, Type B with the RED line.



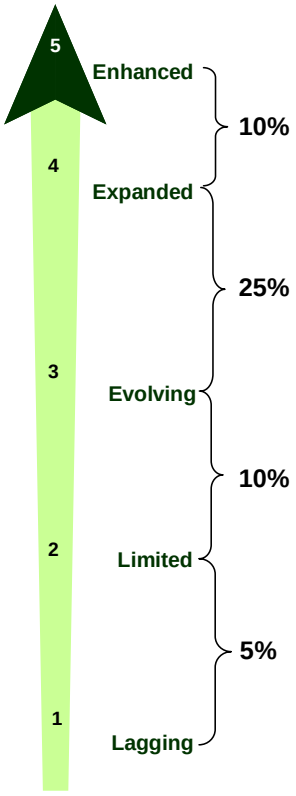
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A 5-point scale is used where 1 is an entry level of sophistication and 5 is a leading/best practice level of sophistication. Each spoke on the wheel is supported by detailed criteria relating to the 5-point scale. A move up the scale results in efficiencies and improved service delivery.

Organizations evolve over time. Some achieve leading practice status in all areas, some in a few selected areas depending on their desired vision. For the City, some degree of evolution is required in order for the City to realize operational efficiency and improved service delivery. For the City's Type B centres, there are significant opportunities for overall improvement. While the City's Type A centres are substantially ahead of the Type B centres and operating at respectable levels, further enhancement and maturity can also be achieved.



Optimum Operational Efficiency (a "5"): Assumes an integrated call centre, the required supporting processes, integrated multiple channel support, and fully functional/utilized technology. Including:

- Implementing full technology solutions
- Eliminating duplicate services and redundancy
- Streamlining management
- Maximizing staff utilization
- Implementing a fully functional performance measurement system
- Maximizing low cost channels
- Staffing to requirement
- Streamlined, seamless process flows
    - Little to no manual work
    - Few to none intermediaries
    - Fully operational "one way of doing things"
- Consolidating call centres

The diagram to the right illustrates the progressive efficiencies that are possible as a move towards the highest level of maturity/ sophistication occurs (i.e. to a "5"). For every gap that is closed (i.e. moving on the whole from a 2 to a 3 or a 3 to a 4) on the wheel, there are corresponding benefits of efficiency and effectiveness. On average, the City is at a 2-2.5 rating. If the City moved to a 5 in all areas, an approximate 40-50 % efficiency benefit could be achieved.

However, the maximum benefits do not come easily. A new service delivery model, investment in technology, and change management is required. The gap between the current sophistication of the City and the leading practice (i.e. a "5") highlights the level of effort that will be required to implement: the larger the gap, the more effort/potential investment is required and in turn, the more benefits will be achieved. Balancing that, the City should also question if leading practice is desirable, and what level of efficiency is acceptable and desirable.

The summary of the diagnostic findings is an average of both the Type A and B call centres and is presented in this section.

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Citizen Focus: Overall performance, when comparing to leading practices, can be characterized as mid to low level (2-2.5).

In general, we found that most Citizen information is re-acquired on Citizens on routine basis, and that limited sharability across Departments exists. Data is entered primarily by the CSR using standard formats, which may vary by Department. Citizen historical data is, depending on the centre, stored in the Department's database and is retrievable, only by that Department, for the most part.

Leading practices, recognizing the limitations imposed through FIPPA, include:

- All non-restricted information available/transparent and shared, through a single source as a repository for all Citizen information
- Data refreshed instantaneously
- Information stored and retrieved may be both qualitative and quantitative in nature
- Citizen historical data is attached or linked to a Citizen profile, or location
- Citizen intelligence gathering is a daily practice
- Proactive engagement initiated by alerts set by 'decision rules' engine e.g. through flex questions, screen prompts depending on the Citizen question
- Periodic mining of data to identify trends
- Common case management system with regular cleansing of data to assure accuracy and relevancy.

We found that the City does not have a strong, common, complaint management tool that is universally accepted throughout the City. Improved practices are required to ensure transparency across the organization. It is important to recognize however that while there is no one tool being utilized, some centres currently are more mature and consistent in practice. Nevertheless, there is no overall integration and analysis. Having this capability would facilitate a Bird's Eye View (BEV) approach to viewing common issues and trends, as well as improved performance measurement and management.

While there is some degree of Citizen satisfaction research that has been conducted, this information is not universally or consistently used to tailor service offerings to customer needs, nor used to develop a tiered approach to customer service. Leading organizations constantly engage Citizens to understand current and future needs and have the mechanisms in place to react and respond accordingly. They have immediate understanding for all Citizen service requirements and leverage this data and knowledge to produce situation-specific service offers that correspond very closely with Citizen's needs. Many leading practice organizations also use data mining of complaints/issues to recognize trends and needs, which are identified and prioritized for future investment. Lastly, they use complaint tracking information to identify service deficiencies and training gaps at an individual and centre level. We did not observe a high level of practice within the City, against the above mentioned items.

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Service Focus: Overall performance, when comparing to leading practice, can be characterized again as low to mid level (2-2.5).

Our review showed that a variety of techniques and practices were being used. In some cases Citizen information must be obtained/retrieved through the existing systems. There were a variety of techniques used, in some cases service request numbers, or dispatch numbers; but in the majority of cases, information must be re-keyed or retrieved while in contact with the Citizen (possibly from paper files), rather than simultaneously presented to the CSR when the call is being presented.

A move to a greater level of maturity would involve the creation of a single-Citizen identifier (in accordance with FOIP rules), with the ability to have Citizen information readily available, through the system as the call is sent to the CSR. Past Citizen applications, contracts, Service Level Agreements (SLAs), assuming different levels of service would be offered to different customer/Citizen groups, could be kept in summary format on the system. Additional enhancements might include a database and/or repository for Citizen applications, contracts, SLAs (again this exists to a limited degree in some centres).
While a vision does exist on a department by department basis, there is no one universally accepted Citizen Care Vision, nor common strategies to achieve that vision apparent. As a result, few service standards exist, and performance tracking against these standards is lacking. Where they exist, for the most part, these are limited to qualitative, anecdotal measures rather than a good mix of qualitative and quantitative measures. Measurement against standards is not a rigorous process, although many are showing a greater concern in this area and in the early stages of putting improved processes in place. In some centres, a Grade of Service (GoS) has been established; however there is little, if any, consistent measurement against that desired service level. Also, where these standards exist, they are far from best practices achieved by other public sector organizations.

We also did not observe standard processes or metrics for quality call assessment. Staff performance reviews range from a monthly process to an annual one. More consistent service standards definition and tracking will lead to a more accurate and usable Bird's Eye View of operations.

Lead time in relation to final service delivery (i.e. standards for response time) varies, based on the nature of the call/service request. Standard lead/wait times are required for service requests in place and must be adhered to (monitored). We did not observe more than basic levels for return of phone messages or e-mail response. IVR and ECP messaging is not being maximized by the enterprise. While some centres do not have IVRs or ECPs, others that do, have complicated configurations which may not reflect Citizen needs. Real time measurement of service level and intra-day adherence to schedule is not presently conducted in most centres. This has a negative impact on the ability to achieve the targeted GoS, as well as result in inconsistent Citizen service and non-optimal use of resources.

Some of the biggest potential for performance inconsistency can occur in the area of call accuracy and completeness of call. There is no standard quality assurance processes or metrics in place to ensure consistency of Citizen service. Those that do have a process in place, do not all use similar approaches. A key enhancement would involve a standard process to "audit" for accuracy, accompanied by an accountability process for corrective action. Post call action (follow-up on the accuracy, completeness and outcome of applications/requests) is not undertaken by all call centres. Those that do conduct them do not use similar approaches.

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Operational Focus: Overall performance, when comparing to leading practice, can be characterized as a mid level score of (2.5- 3).

In the area of service quality measurement, most have shown limited attention to this area. Most call centres rely on real time, or ad-hoc monitoring to measure quality, and as a result there is variation in the approach and tools employed to assess quality performance and the frequency with which this is done. Primarily, we have found that most centres use informal processes to assess performance. The major occurrences of call monitoring and coaching occur during initial training and then tail off significantly after that. Formal coaching and performance management varies between call centres. Some centres conduct these activities on an "as needed" basis; others range from a monthly assessment to a less frequent review period.

Technology and technical support is not considered a major issue within the call centres. This can be a result of the fact that the centres are not operating in a traditional call centre environment, and lack more sophisticated technology to support that. One case in point is the demonstrated lack of readily available, consistent information on call statistics, and operational efficiency reporting, as well as inconsistent understanding and use of this key performance data. Technology support, for the most part is derived from the department itself, with no dedicated resource internally housed within the centre, or a centralized "window" for technical support available. The use of un-integrated technological architecture for some Citizen applications and the lack of a formal emergency operation plan is a potential cause for concern. Considerations for the future should include the ability to ensure:

- Additional technical training and support through e- learning
- Enhanced on-line help features, combined with the use of one technological architecture for all Citizen information
- An emergency/contingency plan

For the most part, we observed reactive initiatives in place to evaluate efficiency and effectiveness, with some level of 'audit' conducted in some centres, primarily on an ad-hoc basis. Leading practices for centres of this nature would involve having more complete measurement processes in place to evaluate ROI on investments and technology enhancements, as well as the resulting qualitative efficiency and effectiveness results. A culture of continuous improvement should be engrained in the call centres.

Management of peaks and valleys in call volumes has been partially addressed by part-time staff deployment. The implementation of real time intra day management of staff, with scheduling tools and processes, will in the future be required to more effectively meet call loads and complete non-queue activity in the most optimal time periods. This will allow for maximum efficiency to be achieved. Schedule adherence is monitored in a few call centres, while in others, ad hoc processes are used. As staffing costs represent close to 64% of a call centres' budget, ineffective deployment and poor utilization of these resources add additional costs, resulting in an inefficiently run centre and/or not achieving prescribed service level expectations.

Formal logon or occupancy expectations have not been set with agents and/or measured in any of the centres visited. In preparation for this process, ACD login standardization (what state to use for activities) must be completed, communicated and monitored on an ongoing basis.

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Strategic Focus: Overall performance, when compared to leading practice, can be characterized as mid level (2.5-3).

The City has undertaken periodic Citizen satisfaction surveys, but the research has only concentrated on major call centre environments within the City. A more regular Citizen engagement is necessary if the City is to move up the maturity scale. A more proactive search for approval and support for the call centre operations (and the value for money of these operations) should be conducted. Periodic value for money satisfaction surveys (of the call centres, not the departments as a whole) should be conducted and measured against accepted targets.

As indicated earlier, while Departmental visions do exist, an overall Citizen Service Vision and strategies to achieve the vision are not visible. This allows for a variance in service delivery and the potential for operational inefficiencies. Consideration should be given to the creation of an enterprise Vision, articulated with strategies and outcomes. Each call centre unit should be measured against the Vision with:

- Discussions held with Community to seek improved alignment
- Differentiated products and services that address unique Citizen's or in the case of certain departments, Customer needs
- Services and programs matched to Citizens' life-stage

Our observations suggest that there is only an ad hoc Stakeholders/Partner/Citizen process in place to connect periodically. While Citizen feedback and verbatim is captured on the issues of the day, for the most part, information is limited to periodic collection and assimilation of experiences about some Citizens on a spot basis to capture trends. Leading organizations have full connectivity in place for Stakeholders/Partner/ Citizens through Collaboration Portals. There exists annual process in place to determine satisfaction (Satisfiers and dissatisfies), establish 'trust' and encourage ongoing feedback to influence change. They employ rigorous processes to combine all information and experiences about each Citizen to ensure connectivity to the "real world", and make Stakeholders/Partners/Citizens an integral part of the service and product development process.

To varying degrees, call centres have the ability to communicate in multiple mediums with a limited degree of targeted/customization to strategic groups. The norm however is mass communication through IVR/ECP messaging, where they exist, or through the print media. Advancements in communication would require the City to consider:

- Increased ability to communicate in multiple mediums with highly targeted/customization to specific groups/individuals
- Enhanced electronic, real time communication
- Measurement of communication for effectiveness
- New concepts tried and measured for effectiveness and ROI
- Triggers in place to identify when enhanced communication is required

In summary, there are opportunities for improvement in call centre practices and operations. The City's operating costs are higher than industry best practices. This is reflective of deficiencies in a number of key areas, as listed below:

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Operating Practices: A key driver for improved performance is internal operating practices. Many of the processes required to significantly improve must be driven from a well-defined and articulated vision/strategy, performance metrics, and the ability to monitor and manage in a reactive and proactive manner. A consistent vision for the City call centres has not been articulated. Consequently, service delivery is inconsistent as call centres individualize and customize service delivery to try to meet the requirements of Citizens calling them. Generally, the call centres have not established performance levels approaching leading practices. Rather, they have set more of a single service level performance metric, which is not reflective of efficient performance. Service level, defined as the percentage of calls answered within a defined number of seconds (80% of calls within 25 seconds), in and of itself does not fully represent the level of service being delivered to Citizens. In particular, the absence of standard process and metrics for measuring quality, accuracy and accessibility or cost per call minute contributes to this limited view of current performance.

Proactive vs. Reactive Management: Leading practices research suggests that one critical factor impacting the success of future call centre environments is the ability to move towards a Managed Call Environment, which means moving to a proactive vs. reactive call centre. Our research shows that in order to lead, call centres must be equipped with the people, processes and technology competencies, before they can move from the reactionary approach to a proactive one that predicts Citizens' needs. The City's call centres are currently reactionary. Call loads are not routinely predictable or forecasted from historical data. Staff scheduling is fixed weeks ahead and not modified to meet peaks and valleys caused by load spikes and/or daily staffing availability. In addition, channel availability is sometimes limited and hours of operations may be limited. Regardless of any improvements that may be undertaken by individual call centres, the inability to manage peaks and valleys through economies of scale cannot be resolved without significantly increasing staffing.

Technology Utilization: The technology platforms, including Automatic Call Distributor (ACD), Enhanced Call Processing (ECP), Interactive Voice Recognition (IVR), Computer Telephony Integration (CTI), Workforce Management software, Quality Management software, and case/work process management software that exist are generally underutilized relative to their capability or are not available in each of the centres, making it difficult or impossible to manage effectively and efficiently.

Leading organizations have created environments built on continuous streams of performance data that measure the effectiveness of their operations. They have an ability to react and anticipate changes. In particular, proactive call centre environments utilize workforce management software and develop the competencies to fully maximize this technology. Through load balancing and scheduling, effective management of resources throughout the day occurs, allowing the completion of critical off queue activity such as coaching, training and performance management sessions in slower load periods. For this load matching to be effective, the availability of part-time staff and a flexible alert plan is required.

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Customer Experience Program (CEP): Results

The Customer Experience Program is designed to determine the overall level of quality and efficiency of service delivered to customers/Citizens. Utilizing the AtFocus proprietary Quality Monitoring and Coaching Scorecard (QMCS) a sample of calls collected from across the City call centre/call taking positions were evaluated for service quality.

The QMCS evaluates service across nine measurement areas that are categorized into two major assessments: customer service skills and knowledge skills. Within the customer service skills assessment there are six measurement areas that make up the overall customer service assessment: greeting, build relationship, telephone presentation, telephone protocol, closing and privacy. Within each of these of these measurement areas, there are specific criteria that are used to determine the quality score for the measurement.

While the customer service skills assessment of the quality scorecard focus on the soft skills that are used to deliver service, the knowledge management assessment contained within the scorecard considers the hard skills related to effectively and efficiently providing knowledge and addressing caller requests for service. Three measurement areas comprise the knowledge management assessment: accuracy of information provided, completeness of information provided and post call action required to complete the request.

The proficiency scale developed for the scorecard uses a five point scale to assess service quality and efficiency: unacceptable, improvement opportunity, achieves expectations, exceeds expectations and outstanding. Each criteria within the measurement areas is assigned a proficiency level across the 5 point scale. The proficiency level for each criteria is used to determine the proficiency for the measurement area and this in turn is used to calculate the proficiency for the assessment area: customer service skills and knowledge management.

For the City of Winnipeg, a sample of 200 calls was collected from across the call centre/call taking operations. The calls were evaluated using the QMSC but were assessed only on the customer service skills; knowledge management skills were not evaluated.

Of the 200 calls evaluated on customer service skills, 24% of calls were ranked as unacceptable, 75% were ranked as improvement opportunities, 1% of calls were ranked as achieves expectation and 0% of calls were ranked at exceeds expectations or outstanding in the delivery of quality customer service. While this indicates a less than satisfactory level of performance, with a proficiency level of achieves expectation being a realistic initial service quality goal, delving deeper into the scorecard data we are able to identify the areas of performance that need to be addressed in order to improve performance and the quality of service provided to Citizens/customers.

Specifically, some of the more common and consistently observed service issues that need to be addressed to improve the service quality to Citizens are as follows:

- Inconsistent greeting and Citizen interaction. Suggested areas to focus on:
  - Introduce a common/consistent method for identification of staff to Citizens including effective branding through Departmental identification
  - A scripted protocol of offering assistance e.g. "How may I help you"

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  - Training to an upbeat, professional tone/voice e.g. addressing the Citizen by name or title (sir/ma'am) throughout the contact
- Improvements in quality call management are required. Specifically:
  - Implementing a professional control/management call process to ensure quality and efficiency
  - Using a confident voice and complete statements that inform the Citizen fully
  - Deploying active listening skills and probing skills resulting in all of the callers' issues being addressed
  - Using probing questions to ensure Citizen needs are fully met
- A City wide telephone protocol is required. Specifically:
  - The proper use of transfer procedures e.g. ensuring a connection to a third party when transferring and providing call details to the third party
- Call Completion procedures should include:
  - Summarizing the key details discussed when closing the call
  - Offering further assistance when closing the call to ensure all issues have been addressed and to avoid unnecessary call backs

While the above identifies areas of performance that can improve the quality of service provided to Citizens it should be understood that many of the behaviours resulting in poor service may be attributable to the lack of appropriate protocols and standards set by the City and the absence of an effective quality program. Many of the performance issues observed could be addressed with effective standards being set, along with effective training and regular quality monitoring to ensure adherence, ultimately leading to effective coaching and training of CSRs to achieve continuous improvement of service quality.

While a CSR may have undergone customer service training offered by the City when first hired, it is our understanding, that ongoing customer service training is not a requirement for staff that deal with the public. In fact, in many situations new staff relies on existing staff for training. While shadowing staff can be an effective training component on it's own without the support of a comprehensive quality program, it poses a danger of simply passing on mediocre or poor customer service skills and behaviours to new staff.

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Call Centre Profiles: Results

Managed call centres rely on a number of performance measures to manage call volume, call flow, call distribution, call length and call resolution. In order to efficiently and effectively manage calls, accurate and consistent statistics are required, such as:

- Call volumes
- Call length
- Abandonment rates
- Occupancy rates
- Call back rates
- First call resolution rates
- Rate of transfers
- After call work time
- Quality/accuracy of calls
- Call satisfaction

Currently, these statistics are not routinely captured, reviewed and used to manage the call centres. However, it should be noted that the City does not require that such statistics be measured and reported by the centres.

A critical measure of operational efficiency is the cost per call minute (CPCM), which is the primary metric unit required when analyzing and benchmarking call centre environments. Calculating by call minute, as opposed to call, neutralizes the type of call and the service provided and creates a common denominator to compare centres against best practices. Therefore, the cost to complete a call that requires 20 minutes of detailed discussion vs. a call that requires a minute to provide transactional information is taken into consideration by simply taking the total number of minutes that staff is on the phone and dividing this number into the total cost of the call centre operation.

Leading practice call centres deploy technology to calculate total call minutes and do not rely on Average Handle Times (AHT, the total length of the call including after call work). However, if the total call minutes is not available, CPCM is calculated by dividing the annual call centre budget (the total costs of operating the centre which should include salaries and benefits for all employees in the centre, recruiting, hiring and training costs, facilities costs (rent, utilities, etc.), technology costs (hardware, software and maintenance), outsourcing/contract costs, and corporate/head office overhead) by the sum of AHT multiplied by the annual number of calls. Using the data provided by the individual City call centres (each Call Centre Data Profile was validated by the call centre) and data from overall telephony reports. The leading practice metric for CPCM is in the range of $0.70 - $1.00 Canadian. It is important to understand that this CPCM includes total cost, meaning all costs of operating the call centre, not simply CSR costs. The table that follows highlights the type of costs included in the leading practice CPCM metric, compared to the costs included in our calculation of COW CPCM.

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Category of Cost	Type of Cost	Average Percentage of Total CPCM	Included in COW CPCM Calculation
Staffing Costs	CSR salary and benefits (this includes full time, part time, casual, temporary, contract, seasonal, students etc.)	60%	Yes (however it appears from the data provided that only FT/PT are mostly included
	Management costs (Team Leads)	10%	**No**
	Administrative staff costs (secretary)		**No**
Other Operating Costs	Administrative costs (paper, pens, manuals)	30%	**No**
	Training/Conferences		**No**
	Space/Accommodation (rent, lease, costs associated with ownership, parking, electrical/heat, workstations/desks/chairs)		**No**
	Technology (new, support, hardware and software)		**No**
	Telephony		**No**

When comparing the COW CPCM it is important to keep in mind that the COW CPCM only includes CSR salary costs. Therefore either the COW CPCM represents about 60% of the real CPCM, or the CPCM that COW should be compared to is $.40-$.60.

The following table shows the City CPCM between $1.13-1.31. Since each call centre has variations of staffing levels and average salary/benefits, two different average salary/benefits numbers were used $43,000/FTE and $50,000/FTE which account for the range in CPCM. Comparing this to a leading practice of $.40-.60 there is still significant room for improvement. The total estimated current cost of "Calls Answered" is at between $5.4-6.3 million. This number does not include costs for accommodation, technology, telephony, or supervisory/management staff, training or other associated costs of providing service. A 30%-40% adjustment must be made to this number to get a truer picture of total costs. As such it can be estimated that currently the total estimated cost of calls answered is $7-8 million annually.

The data contained in the table is an aggregate of all data provided by the City and validated by the Departments either at the time of their site visit, or shortly following the visit. All of the data was presented to PAC and SMT and an invitation to review the statistics with each member was extended. The current day statistics for the City are provided in the table that follows.

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CoW Call Centre	Number of Days Open	Total Calls Answered	Average Daily Calls Answered	Average Handle Time (seconds) (includes time to complete call after hanging up)	Total Minutes On Phone (includes after call work)	Existing FTEs (at current 10-15% abandon rate e.g. hang ups)	Cost of Service (assume average of 43K/FTE salary & benefits)	Cost of Service (assume average of 50K/FTE salary & benefits)	City CPM at $43K/FTE (only includes CSR staff costs. Does not include management/administration staff, technology, telephony, accomodation, training etc)	City CPM at $50K/FTE (only includes CSR staff costs. Does not include management/administration staff, technology, telephony, accomodation, training etc)
Animal Services	248	97,500	393	100.21	162,833	1.8	$ 77,400	$ 90,000	0.5	0.55
Bilingual Service Centre	248	1,680	7	86.25	2,415	1.3	$ 55,900	$ 65,000	23.1	26.92
Cemeteries	248	10,000	40	354.00	59,000	1.3	$ 55,900	$ 65,000	0.9	1.10
City Clerks Information	248	46,600	188	47.77	37,100	1.2	$ 51,600	$ 60,000	1.4	1.62
Environmental Health	248	10,000	40	176.85	29,475	1.8	$ 77,400	$ 90,000	2.6	3.05
Fire Prevention Services	248	17,300	70	182.60	52,650	1.6	$ 68,800	$ 80,000	1.3	1.52
Golf	150	93,500	623	39.34	61,300	3.6	$ 154,800	$ 180,000	2.5	2.94
Insect Control	100	3,565	36	266.76	15,850	1.3	$ 55,900	$ 65,000	3.5	4.10
Libraries	300	27,000	90	120.00	54,000	1.7	$ 70,950	$ 82,500	1.3	1.53
Licensing Branch	248	20,000	81	324.00	108,000	2.5	$ 107,500	$ 125,000	1.0	1.16
Planning, Property & Development	248	87,585	353	97.06	141,683	3.0	$ 129,000	$ 150,000	0.9	1.06
Police - Non-Emergency	365	222,000	608	63.55	235,133	14.3	$ 614,900	$ 715,000	2.6	3.04
Program Registration & Bookings	248	54,440	220	658.07	597,090	8.0	$ 344,000	$ 400,000	0.6	0.67
Property Assessment	248	16,925	68	42.55	12,004	2.0	$ 86,000	$ 100,000	7.2	8.33
Public Works	248	86,563	349	98.63	142,288	6.7	$ 285,950	$ 332,500	2.0	2.34
Risk Management	248	5,305	21	975.49	86,250	3.6	$ 154,800	$ 180,000	1.8	2.09
Taxation	248	109,000	440	285.41	518,500	7.0	$ 301,000	$ 350,000	0.6	0.68
Transit	365	804,000	2203	70.00	938,000	17.0	$ 731,000	$ 850,000	0.8	0.91
Transit - Handi-Transit	365	426,919	1170	71.62	509,616	10.4	$ 447,200	$ 520,000	0.9	1.02
Water & Waste	248	208,831	842	240.00	835,324	26.0	$ 1,118,000	$ 1,300,000	1.3	1.56
Water & Waste Emergency	365	38,019	104	98.28	62,272	5.0	$ 215,000	$ 250,000	3.5	4.01
Winnipeg Parking Authority	248	23,820	96	263.43	104,580	4.0	$ 172,000	$ 200,000	1.6	1.91
Total	**NA**	**2,410,552**	**8042**	**118.61**	**4,765,363**	**125.0**	**$ 5,375,000**	**$ 6,250,000**	**1.13**	**1.31**

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Service Request Maps: Results

The manner in which the 311 Centre handles incoming calls will vary based on the type and complexity of the service request (SR). A SR is defined as any issue for which a Citizen may call the City (e.g. pot hole, complaint, general information, enrolling into a recreation program). To determine what 311 will handle, all the various SRs that the City receives from the public were process mapped and validated with Departments (business processes, current handling procedure, SR data and systems used were included in the maps). In total, 288 SRs have been mapped. Even in a consolidated model, it may be that not all current day calls will be handled fully by 311, some will be handled fully, some partially and some will be taken and transferred. The definitions of these splits (full, partial, take and transfer)[1] are defined as follows:

Full (F)

The *Full* category is defined as a SR which is handled from start to finish by the 311 Centre. SRs in this category do not need to be transferred or referred to a specialist or Department *during* the call. However, these SRs may require some action by another Department (e.g. Enforcement Officer investigating a complaint, dispatching of a road crew) *after* the completion of the call. A SR can be considered full when everything that the current call centre representative completes today will be done by 311 in the future. It is estimated that 70-75% of current calls will be fully answered in 311.

Partial (P)

The *Partial* category is defined as a service request that is partially handled by the 311 Centre and partially by a Departmental call centre staff (not a current day Departmental specialist). A SR can be considered Partial when everything that the current call centre representative completes today will not be done by 311 in the future as some of it will remain with the Departmental call centre representative. This means that not all the work currently being preformed by the Departmental CSR will be transferred to 311. The point of transfer and manner in which the call is transferred (e.g. warm transfer to a specific person, transfer to a main Departmental phone number or transferred to a Departmental specialist team) will be established by each Department and documented in a SLA between 311 and the Departments. It is estimated that 15% of current calls will be partially handled by 311.

Take & Transfer (T&T)

The "take and transfer" category is defined as SRs that have inadvertently come to 311 rather than going to the Department directly. These are SRs that the Departments have identified as not being handled by 311 at all. With these SRs, Citizen should call the Department directly if they desire. However, in order to provide excellent Citizen service, if the Citizen calls 311 instead of the Department, the 311 centre will T&T the call. The point of transfer and manner in which the call is transferred (e.g. warm transfer to a specific person, transfer to a main Departmental phone number) will be established by each Department and documented in a SLA between 311 and the Departments. It is estimated that 10-15% of current calls will be taken and transferred by 311.

The table that follows summarizes, by Department, the number of SRs. Please note that only Departments that potentially would be part of 311 were mapped. For example Fire Communications was not mapped at this time.

[1] F/P/T&T are AtFocus terms used for the delineation of 311 SRs

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Call Centre	Total
Animal Services (SOA/Community Services)	12
Bilingual Service Centre (Community Services)	7
Environmental Health (Community Services)	4
Insect Control (Community Services)	6
Libraries (Community Services)	5
Licensing (Community Services)	7
Program Registration (Community Services)	17
City Clerks	10
Fire Prevention	11
Police Non-Emergency	8
Cemeteries (PP&D)	6
Golf (PP&D)	7
PP&D (Zoning & Permits; Customer Service; Inspections)	24
Parking Authority (SOA/PP&D)	11
Property Assessment	7
Public Works	43
Water & Waste	27
Water & Waste Emergency	30
Risk Management – Claims	12
Tax	12
Transit	13
Handi Transit	9
Total	**288**

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311 MODELS

The CRTC ruling designated 311 for access to non-emergency municipal government services as a complement/support to 911; however, they were not prescriptive in how 311 would be structured or implemented by municipalities/cities. As a result, there is a range of 311 service delivery Models emerging. Through canvassing the USA and Canadian landscape through telephone interviews, web research, a review of public commitments and a 311 web survey, it is evident that many Canadian municipalities/cities are in the same position: attempting to determine the best Model for their City. Most cities start by considering all City services as potential 311 candidates. For those services that are not within the City mandate (i.e. a separate agency, commission), we have been advised that for the most part they are not being considered for 311. However, for some of the City of Winnipeg's SOAs 311 should be considered as a viable option and the impact of including them in 311 should be assessed. In addition, the level of government that provides specific services differs across Canada (for example, in Ontario, social assistance is delivered through the City). These factors make it difficult to determine who is a candidate for 311 by looking to other municipalities/cities. However, generally speaking most cities are moving to a physically consolidated Model with the majority of SRs being offered through 311. The current 311 operations in Canada have yet to finish implementation. Not all SRs have been migrated to 311 or in some cases a decision/review is pending with respect to moving specific SRMs to 311.

Five 311 possible Models were developed and presented to PAC and SMT. A description and illustration of each Model presented in this next section. The Six Models are:

1. Status Quo
2. Take and Transfer Model
3. Pod Model
4. Consolidated Model
5. Virtual Model
6. Independent Model (Agency, Public/Private Partnership, Outsourced)

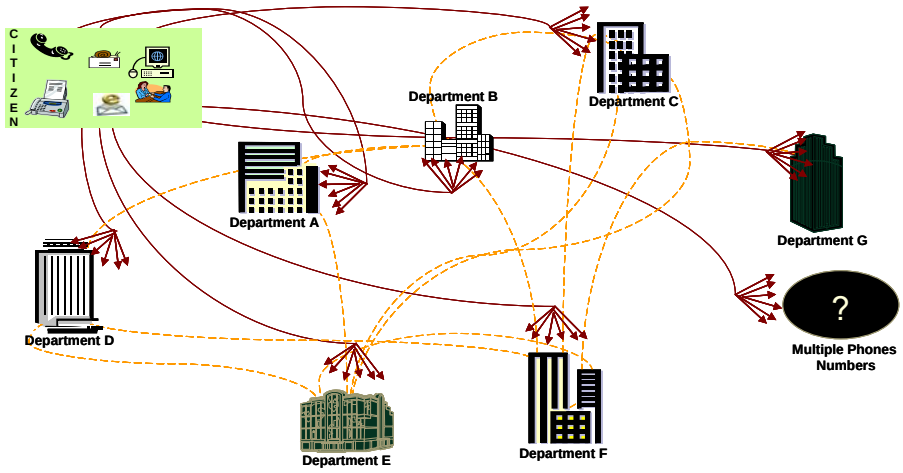
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Model One: Status Quo

This Model retains the current approach to Citizen service and assumes no major improvements to Citizen service, and no requirement for the use of 311. The following diagram illustrates the Status Quo Model.



Model Requirements:

- Existing staff would continue
- No new/enhanced technology is required. However, if Call Centre metrics are desired in the future, consideration should be given to leasing a "Per Agent Service" that temporarily allows for data to be collected
- No site requirements

Model Advantages	Model Disadvantages
▪ Staff continue to be experts in their current areas ▪ Staff can continue to perform "split" roles e.g. phone and counter service ▪ No disruption to current service ▪ No change management requirements	▪ No improvements to service in terms of accessibility, quality, consistency, satisfaction ▪ Service not consistent City wide ▪ Service gaps during the day when absence or when peak loads occur ▪ Citizens must continue to know which Department and which phone number is required ▪ No ability to provide feedback to Citizens on multiple work orders & cross-Departmental issue resolution ▪ Difficult to determine "Bird's Eye View" of the City and to establish a "managed call" environment ▪ Cannot take full advantage of "economies of scale" resulting in higher costs, higher incidents of calls blocked or deflected due to staff shortages ▪ Expensive model for improving service delivery ▪ Upgrade/enhancements to technology will continue to be done individually by Department

Cost

No changes to current state, therefore no new costs are assumed.

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Magnitude of Possible Savings

No savings, efficiencies or effectiveness gains are projected for this model

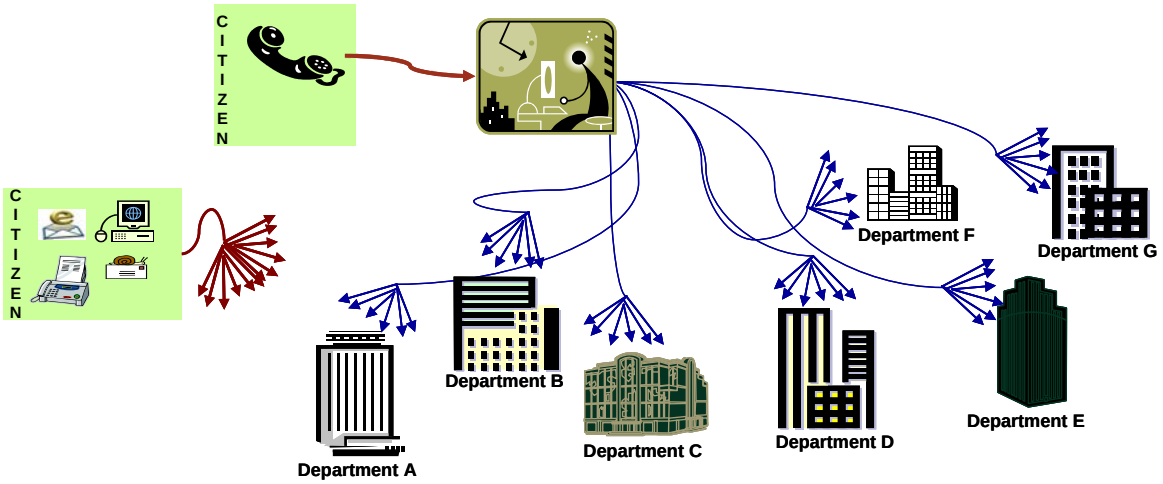
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Model Two: Take and Transfer (T&T)

All Citizen calls would come through 311 into the 311 T&T Centre. The responsibility of the 311 T&T Centre would be to transfer the Citizen to the appropriate existing Call Centre, specific person or location. The 311 T&T Centre will generally not provide any information or responses to Citizens. The 311 T&T Centre will require documented service processes by Department to establish transfer process (e.g. who will the call be transferred to? Will all transfers be "warm transfers"? What action is taken if voice mail is reached?). The following diagram illustrates the T&T Model.



Model Requirements:

- To T&T approximately 2.8 million calls/year (this allows for an increase of 15% to account for improved Citizen accessibility)
  - 12.7 FTEs would be required for a 24x7 T&T Centre with an AHT of 20 sec
  - 17.6 FTEs would be required for a 24x7 T&T Centre with an AHT of 30 sec
- Existing Departmental staff would continue to be in place
- Minimal technology enhancements are required
- Basic ACD or ECP capability is required
- Simple knowledge management & reporting system
- Site required for T&T staff with suitable bandwidth and security

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Model Advantages	Model Disadvantages
▪ Improved Citizen accessibility into the City. Citizen experiences a faster initial answer and transfer to appropriate person ▪ Citizen speaks to a "live" person initially ▪ Minimal disruption to current service and minimal change management requirements ▪ Improved statistics regarding call volumes, number of calls by Department, and "top ten" call issues ▪ Savings will result through elimination of "wrong number" transfers between Departments	▪ Adds an additional layer to the Citizen wait time ▪ Calls will return to switchboard to be dealt with if not answered or reach voicemail for manual handling. This may decrease Citizen satisfaction, resulting in possible increased escalations ▪ Service will not be consistent City wide after initial T&T ▪ Service gaps will still exist during the day when absence or when peak loads occur ▪ No ability to provide feedback to Citizens on multiple work orders & cross-departmental issue resolution ▪ Difficult to determine "Bird's Eye View" of the City and to establish a "managed call" environment ▪ Cannot take full advantage of "economies of scale" resulting in higher costs, higher incidents of calls blocked or deflected due to staff shortages ▪ No savings, efficiencies or effectiveness gains other than reduction of transfers

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High Level Costs

Description	Low Estimate	High Estimate
Technology: One time costs for minor knowledge management system and limited call tracking system	$160,000	$200,000
Staffing: Assumes 35,000/year salary and benefits. CSRs are considered administrative staff not customer service representatives	$440,000	$620,000
Implementation Costs: One time costs for development of Service Level Agreements (SLAs), knowledge management, training	$80,000	$125,000
Sub Total	$680,000	$945,000
Contingency @ 20%	$136,000	$189,000
Total	$816,000	$1,134,000

Cost Assumptions

- Does not include cost of 311 project team
- Does not include integration into legacy systems or major upgrade or replacements of existing telephony platforms or desk top computers
- Does not include continue costs of call handling in Departments post 311
- Does not include accommodation costs
- Does not include annual maintenance costs

Magnitude of Possible Savings

Assuming 5-7% of current day "wrong number" transfers between Departments at an AHT of 30 seconds are eliminated this would result in a savings of $100,000/year.

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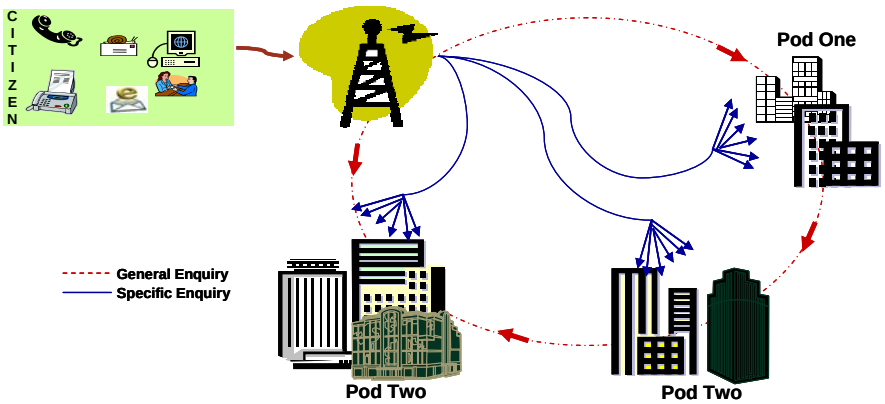
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Model Three: Pod Model

A consolidation of Citizen service would occur into three to four independent Call Centres ("Pods"). All Citizen calls come through a 311 number into an IVR system. Callers select from a list of Pods or "general enquiry". Each Pod is a unique centre in handling their own service calls. Overflow of Pod specific calls do not go to another Pod. General enquiry calls are distributed to all Pods. Technology, call handling procedures, training and call handling technology e.g. a 311 system, can be unique to the Pod. However, if this occurs, Pods cannot transfer data to each other. The following diagram illustrates the Pod Model.

Model Requirements:



- To handle approximately 2.8 million calls/year (this allows for an increase of 15% to account for improved Citizen accessibility) with an improved call centre service level of 80/30, and a lower abandon rate from 10-15% to 4%. a total of 74.8 FTEs are required (does not include management or administrative staff)
- Basic telephony technology enhancements will be required to "link" the Pods together for general enquiries
- The following technology will be required across Pods:
  - ACD, CTI, IVR, Web Enablement, Reader Boards
  - Quality Call Management and Workforce Management
  - Economies of Scale would not offer a ROI for individual QCM and WM at each POD
- Pod specific technology can include
  - Citizen management (311) technology
  - Knowledge management & reporting
  - Integration to legacy systems
- Pods would utilize "best" of existing locations (no new space required)
- Consolidation into Pods retrofit required

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Model Advantages	Model Disadvantages
▪ Citizen experience will be enhanced through improved accessibility, first call resolution, consistency of service within Pod, improved quality of service due to quality monitoring and implementation of EEPs ▪ Ability to provide feedback to Citizens on Pod specific work orders ▪ Enhanced efficiency due to sharing of general enquiry call load and Pod load ▪ Improved statistics regarding call volumes, number of calls by Pod, and "top ten" call issues ▪ Ability to maximize current technology implementations/plans ▪ Less "knowledge management and change management issue" to implement ▪ Decrease in Blue Pages listings	▪ Callers may wait in a second queue if transfer required after general enquiry handled e.g. citizen now has a Pod specific question ▪ Scheduling and intra day management difficult across the multi sites for general enquiry calls ▪ City could experience disruption to current service as Pods are being developed ▪ Change/knowledge management required ▪ Citizen Service not consistent City wide ▪ No ability to provide feedback to Citizens on cross-Pod issue resolution ▪ Difficult to determine "Bird's Eye View" of the City and to establish a "managed call" environment ▪ Cannot take full advantage of "economies of scale" resulting in higher costs, higher incidents of calls blocked or deflected due to staff shortages

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High Level Costs

Description	Low Estimate	High Estimate
Technology: Technology range includes no common Citizen Management System in low estimate. High estimate includes across Pod Citizen Management System. Technology costs can include capital cost or ASP Network based at about $400/agent/month	$1M	$4.8M
Staffing: Assume no new hires, existing staff will be used	$0	$0
Site Retrofit: Assumes current space will be utilized with little requirements for retrofitting	$300,000	$450,000
Implementation Costs: One time costs, for SLA's, knowledge/change management, training, communications	$200,000	$350,000
Sub Total	1.5M	$5.6M
Contingency @ 20%	$300,000	$1.12M
Total	$1.8M	$6.72M

Cost Assumptions

- Does not include costs of re-engineering of processes by Pod
- Does not include integration into legacy systems
- Pods not technologically linked other than by telephony e.g. no Service Request data shared between Pods
- Does not include Management or Administrative staff
- Does not include accommodation costs, only one time retrofit costs
- Includes enhancement or replacement of existing telephony platform (may be purchased or network leased)
- Does not include upgrading bandwidth requirements for each location
- Workforce Management is conducted on one system by each individual Pod
- Does not include internal staff project time (311 project or Departmental)
- Does not include web upgrade
- Does not include annual maintenance costs (assume cost would be consistent with current annual maintenance costs)

Magnitude of Possible Savings

A reduction of 40-50 FTEs city wide or approximately $2-2.5 million/year using an average of $50,000/FTE (does not include management or administrative staff). Due to current union agreements these savings could only be fully realized through normal annual staff attrition. In addition, no reduction of staff should occur in year one or two of implementation in order to effectively implement 311.

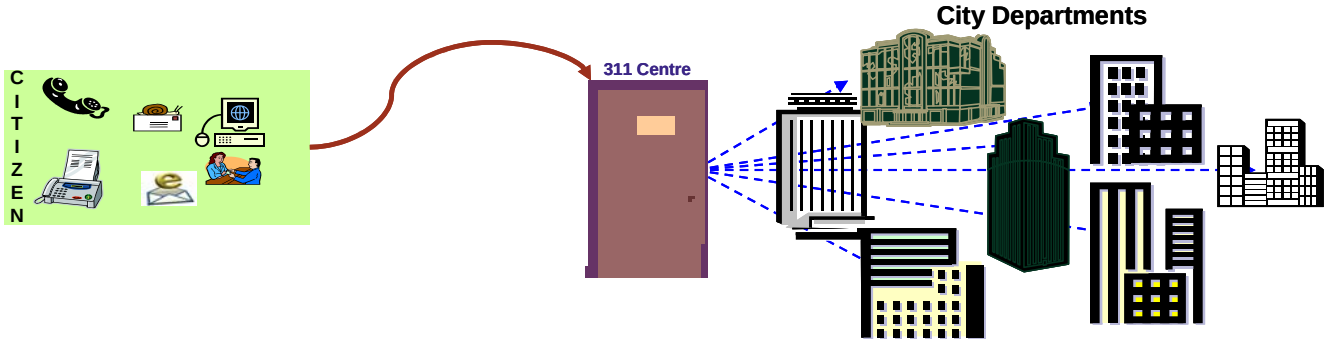
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Model Four: Consolidated Model

All Citizen contacts would enter into a 311 Centre which is consolidated into one physical site. The 311 Centre would be a 24x7 operation that would handle phone, email, fax and web related to any service requests that 311 handles fully. All contacts, general enquiry and Departmental specific contacts would be handled by the 311 Centre. If a Departmental specialist is required, the contact would be transferred to a specialist in the required Department. An IVR would facilitate call routing and allow for more efficient call allocation. IVR selection could be by categorization of call type (e.g. missed waste pickup, complaint, city special events) in order to be transferred to most skilled CSR for that request (skills based-routing could be activated). The 311 Centre would operate on the principle of "one and done", using "universal" CSRs (e.g. all CSRs take all calls), with some specialty skilled CSRs still existing. 311 would directly link to dispatching of work/repair requests. The following diagram illustrates the Consolidated Model.



Model Requirements:

- To handle approximately 2.8 million calls/year (this allows for an increase of 15% to account for improved Citizen accessibility) with an improved call centre service level of 80/30, and a lower abandon rate from 10-15% to 4%, a total of about 60 FTEs are required (does not include management or administrative staff)
- All call centre and 311 call management technologies would be required
  - ACD, CTI, IVR, Web Enablement
  - Quality Call Management
  - Workforce Management
  - Citizen management (311) technology
  - Knowledge management & reporting
  - Integration to legacy systems (where appropriate)
- A new site is required that meets standard call centre site criteria
- Significant staff training and change management is required and interdepartmental knowledge in order to enable the "Universal Agent" concept
- Development of metrics (KPIs) & SLAs with Departments for Citizen service
- Reengineered process maps to support knowledge management

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Model Advantages	Model Disadvantages
▪ Citizen experience is significantly enhanced through improved accessibility, first call resolution, consistency of service across the City, improved quality of service due to quality monitoring and implementation of EEPs ▪ Ability to provide feedback to Citizens on City wide SRs ▪ Maximum efficiency ▪ Consistent service delivery ▪ Maximum intra-day management of workforce ▪ Fastest reaction to Alert Load Planning (Call Peaks) and staff maximization (absences) ▪ Training support in one location available ▪ Easier to engage in team building (one location) ▪ Efficient consistent communication ▪ Ability to implement workstation sharing to minimize costs ▪ Highest occupancy or availability ▪ Improved management capability across the City e.g. creating a "Bird's Eye View" of all service requests, responses, complaints, Citizen service ▪ Highest capacity to schedule critical non-queue activities in larger groups with minimal impact to service ▪ Decrease in Blue Pages listings	▪ Less Emergency redundancy having CSRs all in one site (must find another site) ▪ May affect current travel-to-work time for CSRs and thus affect employee satisfaction ▪ May be more difficult to manage existing counter service levels without flexibility ▪ Major change management required

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High Level Costs

Description	Low Estimate	High Estimate
Technology: Technology costs can include capital cost or ASP Network based at about $400/agent/month. Low estimate includes ASP model	$3.02M	$5.2M
Staffing: Upfront and ongoing cost, assume 4 call centre experts (new staff)	$360,000	$400,000
Site Retrofit: Assume $8,000-10,000/agent: one time cost	$480,000	$600,000
Implementation Costs: One time costs, for SLA's, knowledge/change management, training, communications	$300,000	$450,000
Sub Total	$4.16M	$6.65M
Contingency @ 20%	$832,000	$1.33M
Total	$4.99M	$7.9M

Assumptions

- Include minimal integration into legacy systems (2-4 major systems)
- Does not include all Management or Administrative staff, only additional 311/Call Centre experts
- Does not include accommodation costs, only one time "new site costs"
- Includes enhancement or replacement of existing telephony platform (may be purchased or network leased)
- Does not include internal staff project time (311 project or Departmental)
- Does not include web upgrade
- Does not include annual maintenance costs

Magnitude of Possible Savings

A reduction of 55-65 FTEs city wide or approximately $2.8-3.27 million/year using an average of $50,000/FTE (does not include management or administrative staff). Due to current union agreements these savings could only be fully realized through normal annual staff attrition. In addition, no reduction of staff should occur in year one or two of implementation in order to effectively implement 311.

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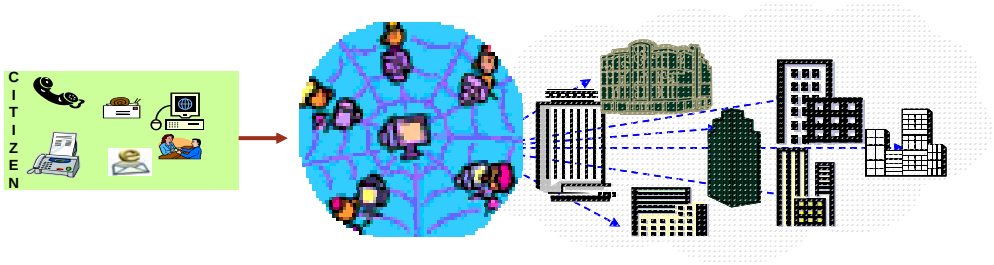
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Model Five: Virtual Model

The Virtual Model is identical to the Consolidated Model in the services it provides and the relationship with the Departments. The only variation in this Model is that staff does not sit together in a consolidated site. All Citizen contacts would enter into a Virtual 311 Centre. This Centre would be managed as "one" Centre with 311 staff located in multiple locations throughout the City or off site. This allows for staff to not move locations and does not require a consolidated 311 site. The 311 Virtual Centre would be a 24x7 operation that would handle phone, email, fax and web. All contacts, general enquiry and Departmental specific contacts would be handled by the 311 centre. If a Departmental specialist is required, the contact would be transferred to a specialist in the required Department. An IVR would facilitate call routing and allow for more efficient call allocation. IVR selection could be by categorization of call type (e.g. missed waste pickup, complaint, City special events) in order to be transferred to most skilled CSR for that request (skills based-routing could be activated). The 311 Centre would operate on the principle of "one and done" using "universal" CSRs (e.g. all CSRs take all calls), with some specialty skilled CSRs still existing. 311 would directly link to dispatching of work/repair requests. The following diagram illustrates the Virtual Model.

Model Requirements:



- To handle approximately 2.8 million calls/year (this allows for an increase of 15% to account for improved Citizen accessibility) with an improved call centre service level of 80/30, and a lower abandon rate from 10-15% to 4%, a total of 60 FTEs are required (does not include management or administrative staff)
- All call centre and 311 call management technologies would be required
  - ACD, CTI, IVR, Web Enablement
  - Quality Call Management
  - Workforce Management
  - Citizen management (311) technology
  - Knowledge management & reporting
  - Integration to legacy systems (where appropriate)
- Significant staff training and change management is required and interdepartmental knowledge in order to enable the "Universal Agent" concept
- Development of metrics (KPIs) & SLAs with Departments for Citizen service
- Reengineered process maps to support knowledge management
- No new site would be required. Depending on where staff are located, site retrofit might be required

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Model Advantages	Model Disadvantages
▪ Citizen experience is significantly enhanced through improved accessibility, first call resolution, consistency of service across the City, improved quality of service due to quality monitoring and implementation of EEPs ▪ Ability to provide feedback to Citizens on City-wide work orders ▪ May result in maximum efficiency ▪ Results in highest occupancy or availability to serve ▪ Improved management capability across the City e.g. creating a "Bird's Eye View" of all service requests, responses, complaints, Citizen service ▪ Provides greater degree of technology redundancy ▪ May be better able to schedule critical non-queue activities (meetings, training, email, mailing) due to queue size with minimal impact to service ▪ Co-location with specialist resources may assist with improved knowledge management in a particular area ▪ Easier to backfill for counter shortages as resources are on site if staff are located close by ▪ Decrease in Blue Pages listings	▪ Difficulty in intra-day management of virtual workforce due to "out of line-of-sight" which will impact efficiency ▪ More difficult to react to Alert Load Planning (Call Peaks) ▪ Training support would be more difficult without available, on site, after-hours training support ▪ Lose the inherent benefits of cross training from sitting next to trained resources or availability to specialists ▪ May be more difficult to engage in team building ▪ May be more difficult to manage to Call Centre objectives when co-located with Department ▪ Change management difficult to accomplish due to co-location with Departmental employees ▪ May be more susceptible to having 311 Call Centre resources pulled to backfill for counter shortages or other Departmental needs ▪ Potential conflict in reporting relationships (Call Centre supervisor vs. Departmental manager) ▪ Potential to feel isolated and not part of either 311 or Department ▪ Costs for integration/networking of technology to multiple sites and CSR desktops (not known what costs might be)

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High Level Costs

Description	Low Estimate	High Estimate
Technology: Technology costs can include capital cost or ASP Network based at about $400/agent/month. Low estimate includes ASP model	$3.02M	$5.2M
Staffing: Upfront and ongoing cost assume 2 call centre expert new staff hired to assist in virtual management	$160,000	$200,000
Site Retrofit: Assume minor one time cost for hardware upgrades	$75,000	$150,000
Implementation Costs: One time costs, for SLA's, knowledge/change management, training, communications	$300,000	$450,000
Sub Total	$3.56M	$6M
Contingency @ 20%	$711,000	$1.2M
Total	$4.27M	$7.2M

Assumptions

- Include minimal integration into legacy systems
- Does not include all Management or Administrative staff
- Does not include accommodation costs, only one time "minor upgrades"
- May not include upgrading bandwidth requirements for each location
- Includes a virtual queue and look-ahead capability
- Does not include internal staff project time (311 project or Departmental)
- Does not include web upgrade
- Does not include annual maintenance costs

Magnitude of Possible Savings

A reduction of 55-65 FTEs city wide or approximately $2.8-3.27 million/year using an average of $50,000/FTE (does not include management or administrative staff). Due to current union agreements these savings could only be fully realized through normal annual staff attrition. In addition, no reduction of staff should occur in year one or two of implementation in order to effectively implement 311.

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Model Six: Independent Model

There are three variations on this Model

- Outsource
- Agency
- Public/Private Sector Partnership

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Outsource Model

Under this Model, service delivery is passed to the private sector to operate a consolidated 311 Centre, while the City would retain overall accountability for service. This Model is a low cost/investment option, as the outsourcer usually bears all start-up costs that would result in improved (most likely leading edge) technology and increased efficiency/savings immediately. Ongoing cost is determined by service level metrics (which is usually a cost/call). There are significant advantages to outsourcing, specifically when an organization is faced with the decision to either build their own "state of the art" centre or outsource. Outsourcing can offer:

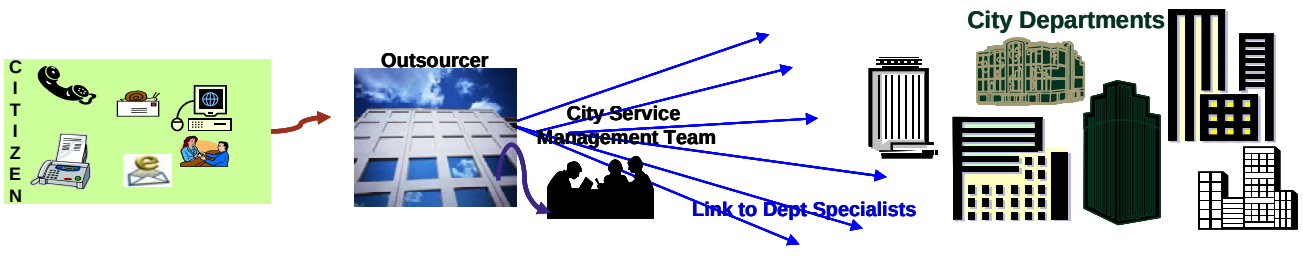
- The highest degree of fast and aggressive change in regards to expenditure control
- Savings
- Leading edge technology in a short time frame, with no significant initial capital outlay
- No requirements/costs to train or re-engineer processes under this option

On the City side, a limited infrastructure would be required to manage the relationship with the outsourcer. In addition, a significant shift in "culture" as the City, Citizens and stakeholders view fulfillment of SRs as a core business of Government. Selecting this option would be primarily to achieve the following three main objectives: to move "ownership" outside of individual operating organizations e.g. outside of Government, to eliminate investments/start-up costs, and to implement at a rapid speed.

New York City has adopted a mix of an Independent (Outsource) Model and a Consolidated Model. The City has two call centres (and three staffing models); one call centre is on City premises, one at an outsourcer location. Both Centres act as a single call centre, with a portion of calls redirected to the outsourced centre based on service level required (call time in queue). The City has about 270 full-time staff, and about 150 PT staff (Part time staff are from the City University under a special arrangement). New York originally chose to outsource for the following reasons:

- The Mayor gave the city 1 Year to be up and running. This could only be done by using a combination of outsourced and City employees
- The outsourcer is more flexible and can gear up for special events and activities
- The City did not have sufficient space to house the total complement of staff needed

The following diagram illustrates the Outsource Model.



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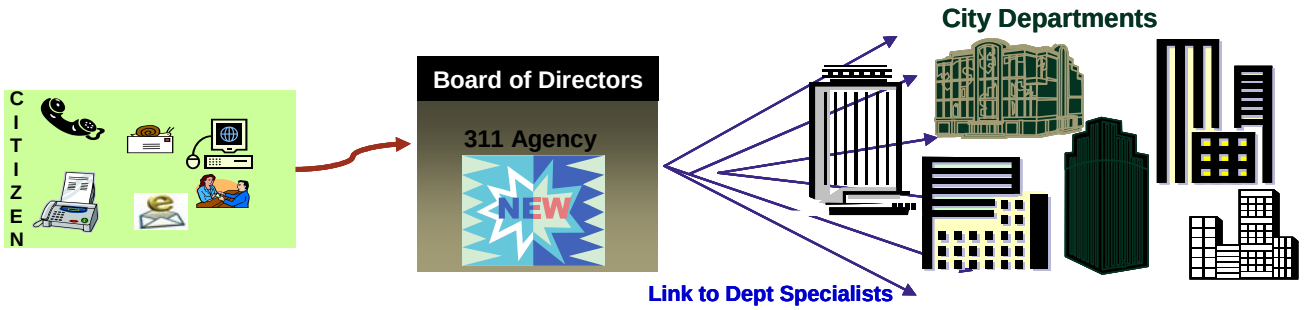
Agency Model

The Agency Model provides a balance between outsourcing and retaining complete control. The start-up costs are same as the Consolidated Model. The Model allows for a major shift in culture through the selection of appropriate resources. It articulates the message that the outcome is a balance between good service and the most efficient Model.

The agency would be provided with service, staffing, performance, reporting metrics and the ongoing budget would be negotiated based on achievement of these. A new governance model is required e.g. the establishment of a board of directors who's objective would be to set up a structure that supports right behaviours/culture required to provide efficient/effective service at the lowest cost possible with demonstrated accountability. This Model may also provide for the "transfer" of suitable existing staff to the new centre to ensure continuation of knowledge. In addition, with effective branding and communication, a new 311 agency may position the City to expand the centre to a revenue generating centre by offering services to other smaller cities more quickly. Selecting this option would be primarily to achieve the following three main objectives:

- To move "ownership" outside of individual operating organizations
- To increase "ease" of implementation
- To aggressively pursue future outside revenues

The following diagram illustrates the Agency Model.



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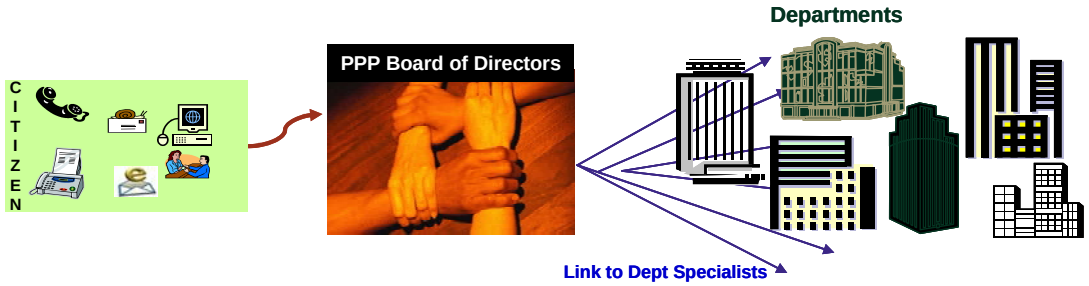
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Public/Private Partnership Model (3P)

This Model represents a hybrid Model of the Outsource Model and Agency Model. Investment costs are split with private sector partner making it a lower cost Model than the Agency Model, but a higher cost than the Outsource Model. However, the City cost sharing could be significantly reduced as private sector partners are often those with the required infrastructure already in place. The benefits of moving to one centre apply to this Model, along with the additional benefits of the Agency Model. This Model may provide for the "transfer" of suitable existing staff to the new centre to ensure continuation of knowledge. The City would require a new governance model required to manage the "partner". Selecting this option would be primarily to achieve the following three main objectives:

- Move "ownership" outside of individual operating organizations
- Split investment/start-up costs
- To pursue future outside revenues

The following diagram illustrates the 3P Model.



Costs and Savings

The Outsource model and 3P model have limited up front capital costs associated with implementation as they are highly dependant on the private sector to provide the "mature call centre" for 311. It can be assumed that the Agency Model is at the same cost as the Fully Consolidated Model.

It is not possible to estimate the magnitude of savings for these models as they are highly dependant on the contract negotiated in each model with the private sector. It can be assumed that the Agency Model will most likely have a possible savings equal to that of the consolidated model.

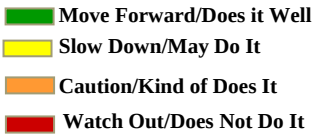
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Scorecard

The following is a scorecard on all models to illustrate how models perform against three main objectives:

- Ease of Implementation
- Tangible Benefits
- Citizen Service



	Criteria	Status Quo	T&T	Pod	Cons.	Virtual	Outscs	Agency	PPP
Ease of Implementation	Degree of Effort to Achieve								
	Up Front Cost to Achieve								
	Ability to Use Existing Technology								
	Manageable Staffing Changes Required								
	Manageable degree of Operational Changes Required								
	Manageable Change Management Required								
Tangible Benefits	Improves Access for Citizens (all calls answered)								
	Improves Ability to Track Service Delivery								
	Results in Significant Savings								
Citizen Service Benefits	Increases Citizen Satisfaction								
	Provides Ability to Track Service Request								
	Increased Service Delivery Confidence								
	Increases Service Accountability								
	Increases City Wide Knowledge Management								
	Increases Quality of Service								
	Increases Consistency of Service								

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Recommendation

The Citizens of Winnipeg should be served through a single, easy to use entry point to meet their current and future service needs. The City should implement a 311 Made In Winnipeg Model which is structured from a Citizen's point of view, one that ensures they can access the service they need at their convenience and receive an accurate, timely, quality response without delay. To achieve this, a fully consolidated 311 model is required. It is therefore recommended that the Business Plan be adopted and endorsed and that the City proceed to the next Phase, that being the preparation of a Business Case for a consolidated 311 environment.

PAC and SMT members supported our recommendation to move to the Consolidated 311 Model. In addition, most members, within their respective groups, supported a fast approach to implementation, rather than a slower approach. PAC and SMT also supported further investigation of the Outsource Model. If there is a desire to pursue this model more fully, it is our recommendation that the City conduct a due diligent review of the possibility of implementing an Independent (Outsource) Model and release an RFI to gain early intelligence around costing and implementation impacts. This should not preclude the next steps for moving to a Consolidated 311 Model.

In order to provide as much information as possible to assist with an informed decision, from this point forward the report presents possible 311 benefits, and a transition/implementation plan for a consolidated 311 model.

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311 BENEFITS

The benefits from a 311 system have been proven throughout the USA and Canada. Depending on the current state starting point, the degree of benefits varies from City to City. However, all have agreed on the following benefits to some degree:

- Citizen Service
- Improved City management and accountability
  - Enhancing the capability of viewing the City from a Bird's Eye View
- Cost reduction
- Enhance/Simplified Technology
- Revenue Enhancement Possibilities

Citizen Service

Improvement to Citizen satisfaction will occur with 311. Studies from the USA and Canada have indicated that Citizens are comparing service in the public sector to existing services in the private sector. They want convenience, reliability and will usually accept a maximum of one transfer when on the phone if they are confident that the transfer will provide a positive outcome. Courteous, accurate and quality service are minimum standards. Convenience (I call when I want), "one stop shopping" (I don't have to call multiple times and places to meet my needs), easy access (I call an easy to remember number and I don't hear a busy signal or just ringing), integration (what I do on the web is visible to the person I call) and service reliability (I always get the same answer, and can always find where to call) are current day expectations.

For CoW moving to 311 will increase Citizen satisfaction through:

- One easy number to remember and dial
- Eliminating the need to figure out where to call. Searching through the blue pages, the City web site, correspondences, bills, etc. will, in most cases, no longer be required
- Improved accessibility: fewer occurrences of "blocked" (busy signal) calls without adding staff. This will be accomplished through the increased capacity to answer calls from the inefficiencies of larger queues (more staff on the phones that can answer all the questions)
- 24/7 availability: extended service hours to ensure Citizens can access services at their convenience
- Enhanced service delivery: opening additional/enhanced service channels will be easier and more efficient with newly documented 311 processes
- Ease of obtaining status updates on all service requests across departments
- Consistent service levels each time the City is contacted. A Citizen will no longer experience varied levels of service when contacting the City. For example, receive a live person vs. voice mail vs. no answer/busy signal
- Improved Citizen "wait experience": When a wait for service is necessary, Citizens can listen to valuable information on current or upcoming City events such as the Census, Prince of England Visit.

The City currently has an estimated 10-15% abandonment rate from Citizens. This means that about 240,000-360,000 calls annual hang up, the call keeps ringing but there is no answer or "get lost in the system". In addition to this the average service level is estimated at over 80/60+ meaning that 80% of the time, Citizens must wait at least an extra minute to have their call answered. If the call takes only 1 minute to handle the total experience for the Citizen is double

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due to their wait time of a minute. Although there are no available statistics on the rate of "blocked calls", those calls that get through but hear a busy signal, as all other metrics are higher than acceptable standards, we estimate this to also be higher than acceptable standards. By moving to 311, the City will improve all of their call standards without increasing staff. All of the 311 Models presented assume an abandonment rate of 4% (significantly improved from 10-15%) and a service level of 80/30 (significantly improved from a service level of 80/60+).

Improved City Management and Accountability

Many of the Cities that have implemented 311, report that significant benefits have been derived through increased attention to the statistics generated from the 311 centre. Calgary and Baltimore have created sessions with Department Heads to review, with City Management and their mayors, monthly performance on SRs and corrective actions taken. New York posts on their website, available to the public, monthly performance statistics on calls taken, average wait time, % of calls taken within 30 seconds and % of language assisted calls, as well as the Top 5 Citywide Services/Inquiries and Most Frequently Requested Agencies.

As a result of monitoring available statistics, Cities have been able to more rapidly address issues affecting City safety and improve efficiencies. Typical examples include:

- Chicago: Overlaid data from the nearly 4000 calls about dead crows with maps of the human cases of West Nile Virus. Now City crews are dispatched at first sign of dead birds to spray mosquito larva, so stops spread / potential spread of West Nile
- New York: Mapping of a variety of complaint types – noise, public drunkenness, double parking – enabled identification of illegal clubs and unlicensed bars and restaurants
- Chicago: Initial intake flagged duplicate service requests at the same or close addresses. As a result, the Streets Department eliminated duplicate dispatch of crews
- Houston: 31% of 311 calls were for Municipal Court queries about traffic violations. The City was able to collect an additional $100,000 per month in traffic fines.
- Baltimore: Reported a total of $13.2 million savings in its first year, including: $6m in overtime; $1.2m in decreased operating costs; $1.2 in decreased absenteeism / accident time
- New York: Neighbourhood groups had led the City to believe that largest contributor to noise complaints were bars and restaurants. A review of 311 data revealed that the biggest racket came from construction sites and barking dogs

CoW will be in a position to view the City from a Bird's Eye View allowing a significantly enhanced opportunity to maximize on centralized data, allocate resources where most required, spot "emerging" issues prior to them becoming critical and be in a position to best defend requests for additional funding. The City will be able to account for their services and understand performance against their service levels.

Cost Reduction

Generally there are six areas of possible savings/cost avoidance for the 311 Consolidated Model. The section that follows presents these six areas and the possible savings of each. Not all savings can be simply tallied up for a total cost reduction and it may not be possible to achieve savings in all areas.

- **Reduction in cost per call minute**: As previously presented, the leading class industry standard suggested by Purdue University, the Gartner Group and other benchmark data suggests that a target for best-in-class CPCM is anywhere between $0.40 - $0.60 Canadian

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(only CSR costs included – see the *Call Centre Profile: Results* section of this report for further details on CPCM). The current City CPCM is between $1.13-1.31. In essence, the City has a potential cost reduction available to them in the range of $0.53 - $0.91 CPCM. To understand the magnitude of possible savings in this area we offer the following example: If it is assumed that a consolidated 311 model will handle 4 million minutes annually, and we assume that there are efficiency savings of $.53, at a minimum, then the City could save about $2 million

- **Reduction in AHT:** Other 311 centres that other Cities who have deployed a consolidated 311 model are realizing up to a 30 second reduction in AHT. This reduction is realized through streamlined call handling processes, enabling technology in particular a knowledge management system, quality call monitoring and coaching and a focus on managing the call. The current cost per second is about $.02 with over 2.4 million calls answered annually. To understand the magnitude of possible savings in this area we offer the following example: If a 30 second reduction in AHT was achieved the City would realize an annual savings of about $1.5 million. While we advocate obtaining the appropriate AHT, it is equality important to note that we do not advocate rushing the caller off the phone in order to AHT, but rather, to institute and support improved call handling processes
- **Reduction in call volume through first call resolution:** A reduction in volume will be achieved by providing a full and complete answer on the first call and be reducing the number of internal transfers that currently occur as the Citizen called the wrong number or has multiple SRs. There is only anecdotal data on the number of transfers in the City, however through sit ins, the CEP, discussions/focus groups and interviews we estimate this number to be well over 10% of the total calls. In 311 the majority of calls well be resolved at point of contact
- **Optimize occupancy/sign-on rates:** Productivity in call centres is defined by a combination of a call processing rate and the percentage of time the CSR is available to serve the Citizen (talk, after call work, Citizen call backs). Our experience has seen occupancy/sign-on improve by 10% to 15% just by setting and measuring against sign-on agreements developed and agreed to by staff. In a centre of 100 CSRs, the net increase could be in the order of 10 to 15 additional FTE's available to serve. This represents an increase in capacity to do "more with less" or a further reduction in required staff
- **Workforce Management Optimization:** Currently, there is little ability to effectively manage peaks and valleys in individual call centres. The ability to forecast, schedule and optimize resource and load changes during the day is severely hampered by the absence of mechanized workforce tools and the nature of the small size of call centres distributed throughout the City. Some call centres are using full time staff without the ability to load balance for peaks and valleys throughout the day/week/month or even seasonally. This inflexibility increases costs (having too many staff during the valley periods, not enough during peaks). Consolidating and establishing economies of scale and optimizing resource forecasting and planning through the implementation of workforce management software and the effective use of this software results in a significant reduction in the required staff compliment and/or cost avoidance in not having to hire additional staff to meet growing service demands. Having maximum resource availability to handle planned or unplanned peak call loads and the ability to make on-the-fly changes for relief periods and valuable non-queue activity (training, coaching, communications sessions and continuous improvement project work) are essential in achieving service levels and maximum efficiencies. Other Cities who have deployed a consolidated 311 model are able to do the same number of calls for

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about 20%-40% less staff. Some staff will be required to remain in the Departments in order to complete the calls not handled by 311 (e.g. T&T). Although in a consolidated 311 model that number of FTEs is generally not very high. However it should be noted that due to current union agreements these savings could only be fully realized through normal annual staff attrition.

- **Cost avoidance in terms of managing a growing number of calls (due to City population increase or significant City wide projects/initiatives/events being implemented) with the same or reduced staff levels:** The 311 program, by virtue of its consolidation of staff, will be in a position to do more with less by forecasting and scheduling staffing requirements or making decisions to beef up alternate communications channels as a call to action (i.e. giving a choice of alternate channels while waiting in queue). This has already been demonstrated in the previous table where the abandonment rate was reduced to 4% (from 10-15%) and volume was increased 15% with less FTEs

Enhance/Simplify Technology

CoW has a decentralized approach to purchasing and deploying Departmental specific technology. Not surprisingly, the City has many local technologies that support the Departments with their work. In moving to a 311 consolidated model, technology would be standardized for 311, making many of these legacy systems obsolete.

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The following table lists the technologies/Call Centre that are currently used. This information was documents/validated by the SRMs and PAC.

Current State Systems Summary System/Centre	Code (A, I, R)	Animal Services	Bilingual Services Centre	Cemeteries	City Hall Information	Environmental Health Services	Fire Prevention Services	Golf Services	Insect Control	Library Services	Licensing	PP&D	Police - Non-Emergency	Program Registration & Booking	Property Assessment	Public Works	Risk Management Claims	Taxation	Transit	Transit -Handi	Water and Waste	Water and Waste Emergency	Winnipeg Parking Authority
AACS (Appeals Application Control System)	A/I														√								
Amanda (information and service request system)	I					√	√				√	√											
Animal Services Radio dispatch system	A	√																					
ASIS (Animal Services Information System)	R	√																					
Call Tracker	R		√												√	√		√			√		
CAMA (database)	I/R														√								
CIS Advisor (information system)	A															√							
CIS Maps	A															√							
Class (registration and booking system)	I													√									
Contact View	A/I																		√				
Credit Card/POS payment system	A	√		√				√			√			√		√						√	√
DMIS Council Meeting Information	A				√																		
Environmental Health Services Access database (Food Safe program)	R					√																	
FIRS	I						√																
Handi Transit Address database (interacts with i-Ride)	A/I																			√			
iCallTaker	R												√										
ICIView	A/I								√														
Insect Control Access database (used to log call query/complaint)	R								√														
Inspector Boundaries System (information system)	R/I											√											
i-Ride (booking system)	A																			√			
I-view	A																		√		√	√	
Manta (tax roll system)	I																	√			√		
Map Info	A								√														
Navigo Trip Planner (intranet/web based)	A/I		√																√				
Niche	R												√										
ONTRAK Internal Dispatch System (information system)	I																		√				
OPAC	R									√													
Parking database	I/R																						√
Permits program	R															√							
Public Works Maps	R															√					√	√	
Raid	R																		√				
Response	I																		√				
Risk Master	R																√						
Stone Orchard System (information system)	A			√																			
Synergen (information and service request system)	I															√					√	√	
T2 Power Pack Flex	I																						√
Tree Roots Program	R																√						
Use of Streets System (street permit system)	R															√							
Water and Waste Emergency Radio dispatch system	I/A																					√	
Water and Waste Mainframe Billing System	I/A																				√	√	

Legend:

A= Information/system is available in 311

I= Integrate system into 311

R=Replace system in 311

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Revenue Enhancement Possibilities

There are three possible avenues for revenue enhancement with the 311 program:

Maximize City Programs: The 311 program will acquire the technical ability to redeploy resources to conduct outbound activity (calls, e-mails or fax) when inbound calls are low. Initially, no new technology is necessary to conduct outbound calls. In the future, if volumes increase substantially, a Preview/Progressive Dialler could be utilized. A Preview/Progressive Dialler can be set to populate a CSRs screen with a specific Citizen profile and trigger their phone to be in a ready to dial state when pre-determined service levels are reached (when there are no inbound calls).

Outbound calls can be used to ensure City program occupancy is maximized (ongoing and one-time events) and that all revenue generating activities are up-to-date or secured for the future (i.e. licensing/permit requirements). For example, during a low call period, the CSR would be presented with a profile of a Citizen who has children in a swimming program. The prompt would suggest to the CSR what the next level of swimming could be sold to the Citizen, or a profile is presented to the CSR indicating that a Citizen's dog licence should be renewed.

Extend 311 Services: The 311 program can be extended on a fee for service basis to surrounding municipalities/cities or other levels of government (provincial/federal). Having an easy-to-access number will most likely entice Citizens to call 311 for other levels of government services/information. These types of calls should be tracked and a business case for funding brought forward once the level of calls reaches a significant level. Moreover, other municipalities/cities may not be in a position to implement 311 for their Citizens. For these governments, the CoW could provide 311 services on a fee for service basis.

Become an Outsourcer: Other levels of government, even possibly the private sector, can outsource short term call centre requirements to the 311 program. It is not unusual that a ready-to-serve call centre be required on a short term basis for a special event, a significant or urgent public communication in an emergency situation (i.e. providing information to Citizens on a new provincial program for two months, providing information for a major conference sponsored by the private sector). The 311 program could be available to fill these short term needs quickly, on a fee for service basis. Specifically for CoW, the 311 Centre could handle the SRs for 211. A specialty team could be implemented in 311 to act as 211 CSRs. A charge back system could be implemented for payment of 211 calls. 211 is the service referral line interface to the community's Support Network Service and plays an integral role in the delivery of human services and programs. The vision of 211 across Canada is to implement a 211 service which will act as a one-window access point for individuals and families who are seeking assistance by way of social programs and services. The establishment of 211 which is separate from 311 will cost considerable time and money. The City can realize significant additional economies of scale in pursuing the establishment of 211 within/jointly with 311.

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TRANSITIONING TO 311: THE IMPLEMENTATON PLAN

The majority of current day City call centre services could be offered through a new, physically consolidated, 311 call centre environment. There are few, if any, services that eventually cannot be transitioned into a consolidated, mature, managed call environment. If necessary, with enabling technology, 311 can continue to respond to unique Citizen service needs using specialists (i.e. skills based routing where specific calls can be automatically forwarded to specific staff), while at the same time benefiting from the improvement opportunities offered through a 311 consolidated centre. It is critical to note and understand that if the service delivery process can be documented and enabled through technology, then staff, any staff, can deliver that service. It is not a question of "can they" it is a question of "how will they". An appropriate implementation plan must be created with care to avoid any dips in service delivery. It may take years to fully realize the potential of a Consolidated 311 Model, but the long term benefits outweigh any short term concerns. Individual concerns must not be ignored but incorporated into the implementation planning.

In order to be as detailed as possible in our analysis as to possible implementation risks, timing of migration and to provide details for the implementation plan, we used our AtFocus proprietary Filter tool that measures 311 candidates against 23 specific criteria. The criteria are grouped into three areas:

- Improvement to Citizen Service (accessibility/quality/consistency)
- Effectiveness and Efficiencies (cost avoidance or cost savings)
- Ease of Migration

It should be noted that in completing the Filter, our analysis was measured against the recommended 311 Model--one that is outfitted with technology, supported by process flows, knowledge management, training and experienced staff. In order for CSRs to be multi-skilled and capable of delivering numerous services to Citizens, the implementation of enabling technology and the documentation of process/work flows must take place. For the 311 centre to achieve the full efficiency and potential saving, the high performance environment technologies listed in the Technology Section must be implemented in accordance with the 311 call centre start-up assessment and used to full capacity. The filter was populated using the data gathered through available statistics, interviews, focus groups, site visits, the Call Centre Diagnostic tool and the completed Call Centre Data Profiles.

Those with the highest scores are deemed to be the best candidates for migrating to 311 earliest, meaning that service can improve, efficiency can be realized, and few significant barriers to migration exist.

The implementation plan, presented in this section, consists of six sub plans:

- Migration Plan
- Expenditure Plan
- Communication Plan
- Change Plan
- Risk Plan
- Training Plan

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Migration Plan

The suggested overall Migration Plan for implementing 311 as a fully consolidated call centre contains 4 phases:

1. Build
2. Mobilize
3. Launch
4. Stabilize

Phase One: Build

This Phase focuses on further detailing the preparatory work required to "go live". Detailed knowledge is gathered and detailed requirements are defined. Little to no capital budget is required for this Phase. This Phase will specifically:

- Draft the 311 overall project charter and establish project team membership. Define all roles/responsibilities, approval processes, stakeholders and who needs to be involved and when
- Develop the detailed project work plan including scope, key milestones, outcomes and timelines
- Develop the city branding of 311, launch communications, communicate with the Telco
- Confirm 311 splits (Full/Partial/Take & Transfer), determine FCE and staffing split including documenting the handoffs for P/T&T and service level agreements
- Draft the 311 2B state
- Prepare a detailed 311 Profile to include required skills, workforce management strategy (FT/PT), union strategy
- Detail City IT integration/configuration requirements
- Complete best practice site visits to begin the change process by "seeing is believing"
- Release the RFI to:
  - Confirm IT cost
  - Determine possibility of alternative service delivery models e.g. outsource
  - Determine what City wide IT costs might be for Departmental configuration/upgrading
- Document business requirements in preparation for RFP
  - 311 Citizen Management System (e.g. CRM system)
  - Call Centre Technology
  - Telephony system
  - Consulting & IT assistance
- Establish criteria and initiate site selection
- Begin to communicate to 211

Phase Two: Mobilize

This Phase focuses on starting to move closer to actually realizing the move to 311. Little to no capital budget is required for this phase. Activities include:

- Establish the 311 governance structure. Who will 311 report to? Who will be responsible for SR service level management?
- Conduct the review on the relationship with N11 (in particular 211), other jurisdictions
- Draft IT RFPs and release
- Initiate any required City wide upgrades

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- Complete site selection and commence site retrofit (most likely requires up front capital and operation budget)
- Develop training and initiate training cycles (e.g. build 311 Simulation Pod)
- Set performance measures with 311 staff and develop baseline for metrics
- Engage Citizens: The survey should be a proactive expectation survey, not a reactive customer service survey. Focus groups and web surveys should be considered.

Phase Three: Launch

This phase completes all the necessary details in order to be ready to go live. The majority of capital is spent in this phase.

- Complete site retrofit
- Procure IT
  - Telephony Switch
  - Integrated ACD Queuing
  - Call Centre Server/Routing Capability
  - Computer Telephony Integration (CTI)
  - Integrated Voice Response (IVR)
  - Integrated Messaging
  - Workforce Management Software
  - Call Recording and Logging
  - Media Reader Boards/Ribbons
  - 311 Citizen Management System (CRM System)
- Hire 311 "new" staff (see organizational model)
  - At a minimum hire an experienced Call Centre Manager or provide coaching for an existing employee, workforce expert, quality expert
- Complete first wave of training and change sessions (see section on training plan)
- Set 311 metrics (AHT, Service Level, quality standards, CPCM, SR volume, Citizen expectation)
- Migrate SRs in three waves

Phase Four: Stabilize

- Measure 311 success against metrics
- Determine if additional SRs remaining in the Department can be migrated to 311 without adding more staff
- Investigate revenue generating streams (e.g. is there a desire by a smaller municipality to have CoW deliver their 311 on a cost/call basis?)
- Continuously improve 311 service delivery model through creative and innovative service delivery enhancements (e.g. allow 20% of agents to become virtual agents and work from home allowing for maximum load balancing)

The following is a high level workplan/timeline for implementing your 311. In order to implement successfully, there are three key areas that must be in place:

- A strong full time core project team with supporting members as required
- A thorough assessment of current day collective agreements to determine approach to efficiency savings e.g. through natural attrition rates
- A review of possible solutions for 311 within existing City technology e.g. Synergyn

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PHASE	COMPONENT	MONTHS 1 – 4[2]	MONTHS 5 – 8	MONTHS 9 - 15	MONTHS 16 - 18
BUILD	Draft the 311 overall project charter and establish project team membership. Define all roles/responsibilities, approval processes, stakeholders and who needs to be involved and when				
	Develop the detailed project work plan including scope, key milestones, outcomes and timelines				
	Develop the city branding of 311, launch communications, communicate with the Telco				
	Confirm 311 splits (Full/Partial/Take & Transfer), determine FCE and staffing split including documenting the handoffs for P/T&T and service level agreements				
	Draft the 311 2B state				
	Prepare a detailed 311 Profile to include required skills, workforce management strategy (FT/PT), union strategy				
	Detail City IT integration/configuration requirements				
	Complete best practice site visits				
	Release the RFI to: ▪ Determine possibility of alternative service delivery models e.g. outsource ▪ Determine what City wide IT costs might be for Departmental configuration/upgrading				
	Document business requirements in preparation for RFP ▪ 311 Citizen Management System (e.g. CRM system) ▪ Call Centre Technology ▪ Telephony system ▪ Consulting & IT assistance				
	Establish criteria and initiate site selection				
	Begin to communicate to 211				
MOBILIZE	Establish the 311 governance structure. Who will 311 report to? Who will be responsible for SR service level management?				
	Conduct the review on the relationship with N11 (in particular 211), other jurisdictions				
	Draft the IT RFPs and release				
	Initiate any required City wide upgrades				
	Complete site selection and commence site retrofit (most likely requires up front capital and operation budget)				

[2] City procurement process/rules, Council approvals, availability of site not factored into timelines

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PHASE	COMPONENT	MONTHS 1 – 4[2]	MONTHS 5 – 8	MONTHS 9 - 15	MONTHS 16 - 18
	Develop training and initiate training cycles (e.g. build 311 Simulation Pod)				
	Set performance measures with 311 staff and develop baseline for metrics				
	Engage Citizens: The survey should be a proactive expectation survey, not a reactive customer service survey. Focus groups and web surveys should be considered.				
LAUNCH	Complete site retrofit				
	Procure IT ▪ Telephony Switch ▪ Integrated ACD Queuing ▪ Call Centre Server/Routing Capability ▪ Computer Telephony Integration (CTI) ▪ Integrated Voice Response (IVR) ▪ Integrated Messaging ▪ Workforce Management Software ▪ Call Recording and Logging ▪ Media Reader Boards/Ribbons ▪ 311 Citizen Management System				
	Hire 311 "new" staff (see organizational model) ▪ Hire experienced Call Centre Manager or provide coaching for an existing employee, workforce expert, quality expert				
	Complete first wave of training and change sessions (see section on training plan)				
	Set 311 metrics (AHT, Service Level, quality standards, CPCM, SR volume, Citizen expectation)				
	Migrate SRs in three waves				
STABALIZE	Measure 311 success against metrics				
	Determine if additional SRs remaining in the Department can be migrated to 311 without adding more staff				
	Investigate revenue generating streams (e.g. is there a desire by a smaller municipality to have CoW deliver their 311 on a cost/call basis?)				
	Continuously improve 311 service delivery model through creative and innovative service delivery enhancements (e.g. allow 20% agents to become virtual agents and work from home allowing for maximum load balancing)				

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SR Migration Waves

In addition to our 311 Filter, and to assist in determining the most appropriate phasing for implementation the following seven considerations were reviewed:

1. Number of SRs: This will impact the staff's capability to manage knowledge required and not be overwhelmed
2. Number of calls: This impacts the volume/size and staffing requirements. The goal is to have a even flow of staff coming in throughout implementation
3. "Obvious Calls": Those calls that Citizens will likely call 311 as soon as it goes "live" should be included otherwise Citizens will criticize the 311 service as they do "not see a change"
4. Complexity of SRs: The goal would be to ensure the complex SRs are distributed throughout the implementation plan so that staff do not feel overwhelmed
5. Seasonality: Moving in SRs during their peak seasonality will impact 311 success ability
6. Calendar of Events: Review any major planned activities for the Department for the next 12-24 months and determine the impact a move to 311 would have on these activities
7. Attempt to keep Departments "whole" to facilitate change management, communication and limit Departmental disruption

Three waves of migrating SRs into the 311 environment is recommended, however, the final schedule of moving call types into the 311 centre will be dependent upon time of year. It is not recommended moving service requests into the 311 centre at a seasonal peak time. For example June would not be a good month to move Tax calls into 311.

Required Technology

In order to achieve the results presented in the 311 Results section of this report, 311 must operate within an improved performance environment. As such, the ability to manage data and be proactive in meeting service challenges (daily, monthly and seasonally) through the efficient and effective deployment of human resources must be established. This can only be achieved through the implementation and proper utilization of enabling technologies. This section describes the required technologies for 311. This section highlights the technologies required to successfully implement 311 as described in this report and to achieve the benefits.

Telephony Switch: 311 will include a fully integrated telephony switch to ensure the immediate and future multi-channel needs of the CoW are achieved. Currently, the City has been operating its entire telephony infrastructure on a Telco-based Centrex platform. While this technology has served the City well, platform enhancements or a replacement infrastructure will be required for 311

Workforce Management Software: This software allows effective scheduling, forecasting and intra-day management of resources. Effectively operated, it will schedule non-queue activity in low call volume (valley) periods while restricting activity to ensure more resource availability in known or planned peak periods. This software typically comes with a vacation scheduler and a planning module to measure the impact of known upcoming events and enable required resource hiring and staffing

Call Recording and Logging: This system captures calls for quality assessment and knowledge and skill gap analysis. It is an invaluable tool that ensures that a consistently high level of service occurs on Citizen calls and that CSRs receive valuable feedback on their strengths as well as opportunities for

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improvement. Typically, accompanying this tool is a Quality Monitoring Balanced scorecard to ensure consistent scoring and timely and valuable coaching feedback

Integrated ACD Queuing: The system allows the presentation of voice calls, emails, faxes, and outbound follow up calls to be queued to CSRs ensuring service levels are achieved. This capability, when utilized properly, will guarantee a steady flow of work for CSRs. When call volumes drop, many organizations will also schedule and present Computer Based Training (CBT) Modules right to agents' desktops to encourage continuous improvement

Call Centre Server/Routing Capability: This capability is a critical component for the 311 infrastructure, and can be handled with IP or convention telephony. Through this technology, a specific call can be directed to a particular CSR or pod within 311. Having the call arrive to the most appropriate person will facilitate seamless service delivery particularly in the early stages of 311, where knowledge requirements are high for specific areas. In these cases, calls can be directed to the specialist CSR until all other 311 CSRs are trained. The following routing capabilities are available:

- ACD is a software application that routes incoming telephone calls based on call trunk groups to longest available agent in a group. It provides "First In, First Out" (FIFO) queuing if no agent is available and can also provide conditional and/or skills-base routing and prompting. Reporting capability may be an option and should be acquired. This software can be stand alone, or be part of the network, LAN or PBX
- Conditional Call Routing directs inbound telephone calls to staff based on pre-defined conditions such as: time of day, day of week, holidays, number of agents, number of waiting calls, time in queue
- Skills Based Routing of inbound telephone calls directs calls to staff that have the skill sets that match the needs of the Citizen. Skill sets may be defined by managers, by the level of expertise or by language. For example, a very experience CSR will receive the call before a less experienced CSR
- Expected Wait Time makes call centre routing decisions based on wait times for calls in the queue using algorithms that continuously estimate call waiting times. Announcements of expected response time can make the queue wait time more comfortable and assist in setting wait expectations

Computer Telephony Integration (CTI): CTI allows integration between the telephone and the computer systems to enable a "screen pop" of the caller's profile, related information, authentication of the caller, and many self-service capabilities (by utilizing touchtone digit input or voice recognition technologies, where provisioned)

Integrated Voice Response (IVR): IVR allows integration with Citizen's calls with a series of self-service menu selections and prompts for services, including:

- PIN-based self-authentication
- General information queries
- Update/edit of "tombstone" data (basic contact information)
- Transfer information to submenus with fax-back options i.e. a newcomers to Winnipeg fact sheet
- Transfer to an audio text sub-menu i.e. a welcome message from the Mayor to all newcomers
- Book appointments, i.e. a tee-off time golf booking
- Transfer to "live" agent for service

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Integrated Messaging: This is a messaging capability that allows the capture of voicemail, fax and email and allows storage and retrieval from the CSR desktop. This capability, in conjunction with fax server, allows more efficient management of communications.

Web Enablement Capability
Web enablement is an "end state" capability which maximizes self-serve options. At the present time, we are not recommending any additional enhancements over and above current capabilities. A key implementation consideration is to manage the capability as a stand alone channel successfully before blending with other contacts. Available features include:

- Web Chat
- Web Collaboration: enables an agent already engaged in web chat with a web user to both read and edit, i.e. to collaboratively edit the same document or form on the user's screen
- Web Call-Back: enables web users to submit a request to an agent to call back at a designated telephone number
- Voice over Internet Protocol: enables web-based self-service user of a voice card-equipped PC to "zero out" and establish voice contact with a live agent

Fax Server: A Fax Server allows callers to select a menu prompt from the IVR system for selected materials to be faxed to them (i.e. program information). The IVR menu prompt requests that the caller enters (through their touch tone keypad) their fax number and then validates it by playing the number back to the caller for confirmation. The document to be faxed is directed by an interface (i.e. between the IVR system and the repository that stores the documents electronically) to the fax server software where the document is queued to be faxed to the caller's fax number

Media Reader Boards/Ribbons: This technology is represented by a "board" on the wall of the 311 centre and is also visible across desktops. CSRs and employees have up-to-date information on what is happening in the City; for example, a special event day, emergency situations such as flooding, or point in time significant service impacts such as a major accident. Service levels for the different contact channels can also be displayed. These boards are also used for "on the spot" cross-training, immediate notifications of City-wide announcements or service delivery changes.

Citizen Management System (CMS): The configuration and advanced mapping of contact flows and processes will be a large undertaking, but one that can be planned and timed to ensure the 311 implementation is successful. A CMS system (referred to in the private sector as a CRM) is a foundational requirement for 311. All other technologies pose an implementation challenge and learning curve to some degree. The procurement, implementation, customization, training and adoption of the CMS system constitute the largest consumption of time, the largest risk and the greatest cost to any consolidated call centre. This system is the bridge between the CSR and the ability to take calls for multiple service areas. The system can also enable efficiencies and effectiveness within 311 and across the City. This system can be comprised of a Work Process system, Citizen Relationship Management (case management) system and a general Knowledge Management system. Depending on the CMS system selected, separate systems may have to be implemented.

The CMS is the information repository for 311 and facilitates proactive service delivery and decision making through process workflows, "look-alike" scenarios and decision trees based on regulatory and policy criteria. The system should have the ability to mine information from Citizen

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files and identify seasonal application trends, peak application periods and regional preferences to be used to create programs and create marketing materials to streamline the contact process. There are various systems available. In Canada, there is not enough progress on 311 implementations to determine if one system will become the "system of choice". Some of the available systems are:

- Motorola: Referred to by many as the "311 System". Extensive application across the USA, with only two confirmed applications in Canada (Calgary and Windsor)
- Oracle (PeopleSoft and Siebel), SAP: Traditionally a private sector Customer Relationship Management System. One American City has used Siebel for their 311 and more recently, the federal government purchased Siebel for a large scale call centre implementation for one department. Oracle, which is starting a 311 initiative in Quebec. No know SAP implementations
- Bell: Bell has developed a 311 system, in conjunction with Pivotal Systems, initially for Gatineau for their 311 implementation
- There are also a number of smaller systems used sporadically in the US and in Canada for City Consolidated Centres (Hanson, Amanda and Lagan). In-house developed systems or systems that are being used currently by a City (and are adaptable to 311) are also emerging as 311 technologies, for example, Ottawa uses retained their in-house system with their move to 311.

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Site Selection

Selecting the location of the 311 centre is extremely important and must consider a number of factors. It may not be possible to obtain all of the required elements, however, it is important to identify what site criteria are most significant to the organization and to the success of 311 ("must haves"). To better identify the most appropriate site, criteria should be weighted according to their importance. The following list provides an overview of the elements that should be considered when evaluating a site:

- Accessibility: the location of the centre must be readily accessible, this would include proximity to major roadways and public transportation
- Atmosphere: the physical environment offered is extremely important to the health and well being of staff, the space should be comfortable with natural light/windows that are close to staff and use noise insulation features to help ensure a productive workspace
- Site Specifics: a single floor plate is desirable with handicap access, 9 ft ceilings, 30 ft spans in office and 64 sq ft per agent, HVAC (High Volume Air Circulation) with variable air volume which will enable the Call Centre to have sufficient air circulation on off-normal hours and a reasonable cost per square foot of space
- Staff Amenities: amenities that are available to staff have a positive influence for attracting and retaining employees. For example, parking, lunch facilities can offer a significant incentive, providing a convenient and cost effective solution to staff
- Building Infrastructure: the building infrastructure should be compatible with the required technology and offer the ability to grow and use future technologies
- Growth: it is important to understand the future opportunities and growth requirements of the centre to ensure that this can be accommodate
- Security: security must consider both the physical security offered to staff, e.g. for parking, elevator access, as well as, overall security of physical assets contained within the operation
- Telephony Links: the site must be checked to ensure that telephony linkages that are required can be supported/provided
- Ability to support: the site location should also consider those staff that may not be located at the centre but have the responsibility to provide service to the centre. Locating a centre far from these core support services may effect the responsiveness of the service received and may result in less than optimal SLAs between the parties (this is only significant if future SLAs include face to face meetings; however, it is not anticipated that this is a high requirement for the City)
- Health and Safety: the health and safety of staff must be considered, with all City policies and procedures adhered to

Our experience suggests that, as a rule of thumb, approximately 100 sq feet/ CSR should be budgeted. This would allow for staff workstations, lunch and training facilities, required for optimal comfort and work environment. Allowing for approximately 60 seats and 10 additional FTE positions, the CoW 311 Centre would require about 7,000 square feet. If a site could be located that could allow for an additional 3,000-5,000 square feet expansion, this would ensure future growth and expansion potential.

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Communication and Change Plan

It is critically important to capitalize on optimistic thinking around 311 and manage any hesitant thinking about 311, by carefully managing all communications and by beginning immediately. Strategically designed and controlled communications to the public, politicians, stakeholders, current call centres and other Departments must be developed prior to any implementation steps being taken. All communications should follow the messages provided throughout this report (both qualitative and quantitative messages) including the possible future ROI for the government/public. The fact that the City seems to have dedicated and loyal staff/Departments will ironically present one of the biggest challenges for implementation. Reactions from the service delivery community



will most likely be to object to the viability that "others" can handle their calls. It will also most likely be argued that Citizen enquiries are an important business function that cannot be easily transferred. However, this reaction, although important to acknowledge and manage, should not stand in the way of the significant potential for improved services and benefits. All significant change initiatives meet with this type of reaction, and if they are to be successful, overcome them. We refer to the entire process of moving/opening a 311 Centre as a "**Countdown2Change**" (**C2C**)*. For CoW the C2C has begun and early questioning/resistance is already surfacing. This should be considered positive as it ensures that staff are engaged and are questioning/assisting in the change process. The C2C model that follows presents the conditions that must be in place to achieve successful change.

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There are a number of change challenges in implementing a new 311 Centre, in particular where a City consolidate call centre does not currently exist. These change challenges and our recommendations on how to manage the change are listed below:

- **Closing of current call centres**: Provide as much notice as possible to the current call centres (six months is desirable and reasonable). Current call centres should be in a position to relinquish responsibilities within a reasonable notice period identified through a phased implementation. Staff from the current call centres should transition to 311 and begin to rotate in/out of 311 at least 2 months prior to their move
- **Time to establish a new centre:** Ensure that work on the requirements for the new centre start immediately following approval of the project proceeding. A representation of Departments should participate in the special purpose body. Hire the Director/Manager of 311 as soon as possible to take ownership and leadership of the 311 Centre
- **Staffing of the "311 new centre**": Assess current agents to determine their skill level, technological expertise and cultural/philosophical fit with the requirements of the new centre. Where feasible, experienced agents should be prioritized for positions in the new centre. In particular, the new centre will require skill and expertise in technology and multiple desktop applications. Current day collective agreements may pose limitations/restrictions on the desired staffing model and staffing levels for 311
- **Ensure Foundational Training:** Leading call centres embrace a philosophy of continuous learning. Training hours are allotted for every front-line agent (ranging from 90-150 hours annually) and are factored into the call demand forecasting and resource scheduling at least one year in advance. In order to maintain high efficiency levels, call centres are adopting practices that allow for on-location learning. By not removing agents from the phone to attend "live" training, an increasing number of companies are making use of the e-learning to provide training to their staff on the desktop. They are posting information and tips on their intranet to allow employees to have the information they need at their fingertips, while still being available to answer calls. There is other software currently available on the market that can be used to produce formal, interactive training modules. Each training module includes conceptual information presented in text and graphic form, followed by an automated scenario for the agent to practice and receive corrective feedback. The software can be integrated with quality monitoring software so that supervisors can send appropriate training modules to agents' desktops when they identify gaps in their training. The software is also designed to integrate with a contact centre's ACD system, monitoring the call volume and pushing the appropriate modules to the agents' desktops when call volume is low, allowing agents to take advantage of slow periods for training
- **Develop supervisory and management skills:** These skills are important for a well-managed call centre workforce. Management must receive and be refreshed in "soft-skills" training (such as communication and people skills, coaching and leadership skills) and "hard-skills" (such as workforce and HR planning, quality assurance and quality control)
- **Ensure continued reliance and involvement from Departments:** It is imperative and critical that if 311 is to be successful it is seen as a City initiative, not "someone's project that is being done to them". It will be necessary to assists Departments to see the value of "losing" SRs and staff, but it is critical that they are supportive and assist in making it work

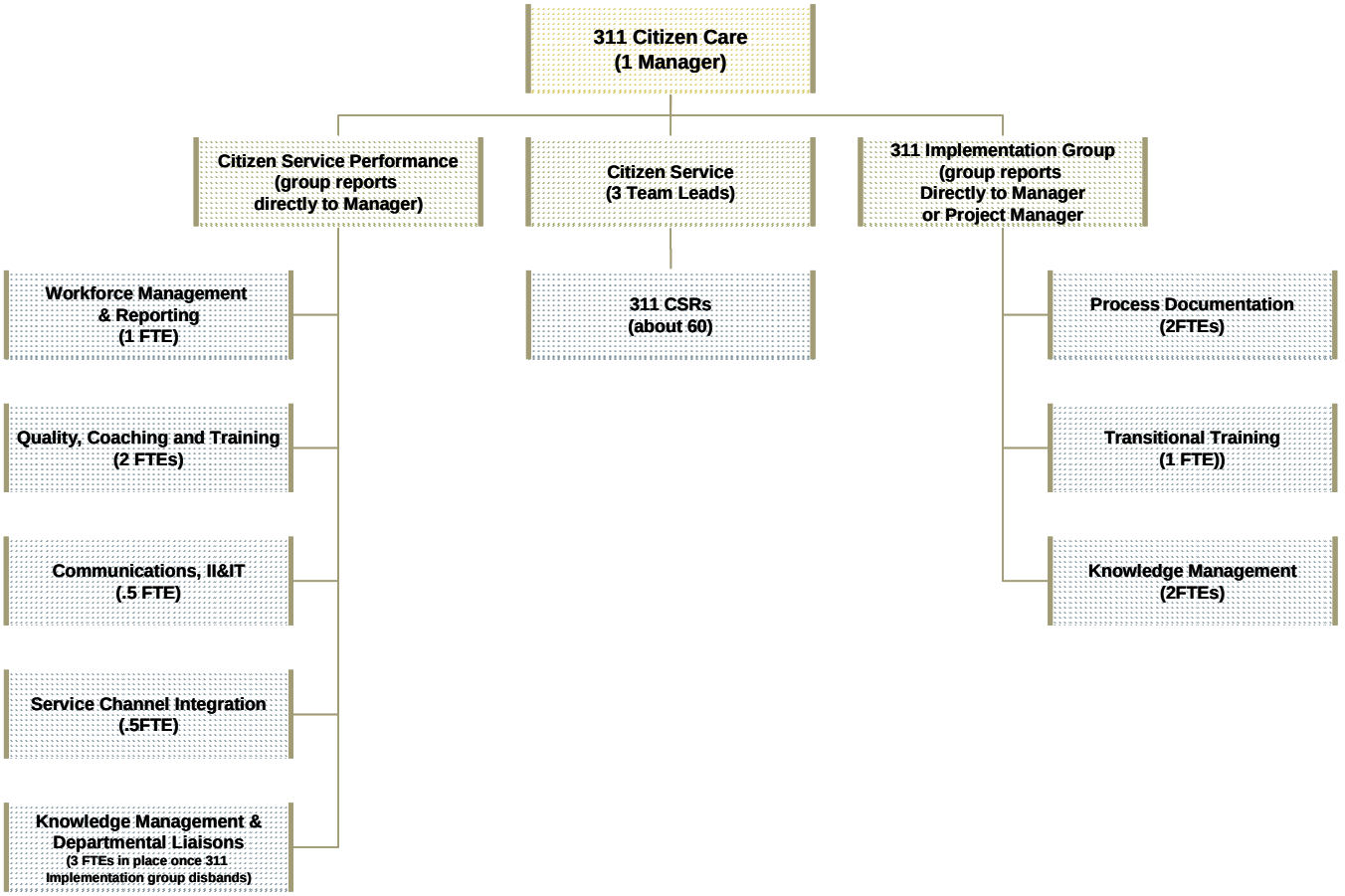
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There are two critical success factors from a communication/change perspective. The first is the requirement for significant participation and cooperation from senior staff. Senior Management Team and Department managers must realize the significant shift in the current day service delivery model that 311 program requires to achieve full benefits and must be willing to take this journey.

The second is not to rush the benefits. The end state organizational structure will result in a significant reduction in the overall staffing requirement and operational costs. Until 311 is stabilized and running at full efficiency, and Departments have sufficient time to adjust and re-engineer "behind the scenes" if necessary, staff re-deployment cannot be achieved. Otherwise, there is a serious risk that service to Citizens could be significantly jeopardized and change management efforts to bring the 311 program to full realization will be damaged.

Organizational Structure

Part of the change plan is instituting a new culture at the 311 Centre, one that is Citizen Service focused while operating within an efficient Call Centre Model. As such we are suggesting the following 311 organizational structure. The following organizational chart provides the functional roles that are required in the 311 organization. New roles are required to ensure that 311 is proactively managed and delivers high quality service at the most efficient level and to ensure staff are continuously improving.



Manager Citizen Care (one position): The 311 organization must have a leader. A dedicated, very organized, and performance metrics inclined person must fill this role. The position should be filled prior to full implementation, and if possible, early in future planning efforts of the 311 Program. The Manager will play a key role in the management and interface of the 311 organization with the rest of the City. This position will be responsible for carrying forward the City vision for

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channel enhancement, in particular, web self service enhancement. The Manager will also be responsible for goal and objective setting and measuring those results, including the accountability for the long-term and short-term staffing plan and the yearly budget. The ideal person would have government experience, multi-channel service delivery experience, and call centre management experience. However, to some extent the call centre expertise can be supported through the lead positions in the Citizen Service Performance and Citizen Service areas and an external "coach" if required.

Citizen Services Group: This group provides service to Citizens. They are the front facing CSRs and are structured in teams with team leads and an overall supervisor. For the most part it is likely that CSR positions will be filled with existing staff. The success of 311 is based on current day staff experience in their particular areas. As positions become available (due to attrition or promotions) a mix of current day City staff and "new" staff is recommended. Required experience for new staff should focus on direct call centre experience, and less on public sector experience. The overall leadership and supervision of the Citizen Services Group requires:

- Extensive knowledge of City of Winnipeg processes and services,
- Leadership and coaching experience
- Basic computer skills
- Experience with call centre technologies and methodologies

Citizen Service Performance Group: This group is the backbone to ensuring that 311 is an ongoing success. The group will provide the 311 program with:

- Workforce Management and Reporting capability: Enabling effective and efficient service delivery with real-time data management and forecasting models. These models will enable the Centre to determine how many CSRs are needed and at what times during the workdays
- Quality, Coaching and Training capability: Providing the process and data that encourages and moves the organization to a leading practice level
- Communications, Information and IT services: Providing co-ordination and determining ongoing requirements
- Service Channel Integration: Enabling the Centre to meet Citizen needs and provide enhanced self service capability. It will also ensure that the relationship and integration of various channels are effective and are maximized

The overall leadership and supervision of the Citizen Service Performance group will be responsible for the scheduling, measurement, reporting and quality control components. The group leader will have a significant role in encouraging a team environment by ensuring that the implementation of CSR motivation and continuous improvement programs are in place. This position will also be accountable for measuring levels of Citizen service quality. Skills required for this position are:

- Advanced knowledge of contact centre Workforce Management
- Advanced knowledge of telephone systems, ACD and contact centre methodologies
- Experience in managing in a multi-channel environment
- Strong expertise in managing with metrics and to outcomes

311 Implementation Group: This transitional group is critical to ensure that the rest of the 311 organization is able to focus on the task of providing excellent service during the transition phase. The overall planning, documenting and implementing of 311 will be the primary responsibility of this group. In addition, transitional training and knowledge management are also the responsibilities

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of this group. This group should be set up prior to the 311 program going "live". They will work with the Director of Citizen Care and the rest of the City to detail the program, document business requirements, and develop and implement a change/training plan and a communications plan. They will also begin the task of managing knowledge and documenting current and future service delivery processes. A team that has project management, process reengineering, change management, and significant call center experience is required. It is envisioned that the skill set of this team will change over time and that in addition to the core staffing group that are dedicated full time. A rotation of other City staff from various call centres, counters, and Departments will also contribute through part-time or special assignment to this group.

Governance Structure

A 311 Centre needs a strong governance model to ensure its success. A poorly handled response to a Citizen's inquiry can undo many years of good service and building of your 'brand' perception. Many people approach contact centres from a process point of view, or a system-driven focus, but it is crucial to remember that contact centres are an important way for Citizens to get in touch with government.

The manner in which governance issues are handled also impact the effectiveness of change. There are two significant issues to consider when determining the 311 governance structure; the first is determining where 311 will belong, in the organizational structure. The second issue is the overall governance model, including accountabilities, roles and responsibilities, and authority levels throughout the City in terms of setting service levels, monitoring adherence to service levels, and determining when and what service is merged into the 311 center.

A City-wide call centre is a natural fit for the Department that provides overall service to the City to make it work. The Corporate Service Department would be a likely candidate to include the 311 program within its mandate. In Canada, most municipal/City consolidated call centres report into the Corporate Services Department. However, it should be noted that this is a departure from the traditional definition of corporate services in that 311 (or a consolidated call centre) provides service to the Citizens on behalf of other Departments rather than providing services to the internal organization. In the private sector, there is a trend to elevate customer service to a Department of its own, as has City of Calgary.

More importantly, the governance structure of "how to make this work" requires careful consideration. A number of issues will arise that require City-wide governance decisions, including:

- **Warm transfers:** a guiding principle that would require that any 311 call that requires a transfer outside of 311 will be a "warm transfer" (i.e. staff to staff). Is the City is in a position to adhere to this type of principle--can Departments commit to the receipt of a warm transfer?
- **Citizen service:** service delivery standards will be set for 311, however, if consistency and high quality Citizen service is the overall objective for the City, should these same service delivery standards be adhered to by all City staff in dealing with Citizens?
- **"Hand off" protocols:** when and what is 311 responsible for and what are other City staff responsible for? Who has the overall mandate of monitoring the risk of calls "slipping between the cracks"?
- **Service Level Agreements (SLAs):** must be developed between 311 and Departments to ensure that 311 meets Departmental standards in delivery service to "their customers". Who will negotiate the SLAs and monitor compliance objectively?

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These governance issues are present in everyday service delivery; however, they become critical as 311 is implemented because it is the cornerstone of the City's public interaction with Citizens and if processed openly with involvement from Departments, will greatly assist in a positive change experience.

Risk Plan

When meeting with the Departments possible migration issues were explored. The table that follows provides a list of migration issues either raised by the Departments that relate to the migration of the service requests from their current environment to the proposed 311 future state or are included as a result of our previous 311 experience. The table also identifies possible strategies to mitigate the effects of the migration issues on the success of the 311 initiative. The identified migration issues can be categorized into three main groups:

- Workload: These issue deal primarily with Departmental workload or the anticipation that 311 will not be able to handle the workload
- Service Quality: These issues deal primarily with concerns that quality and accuracy of service will decrease as a result of 311
- Change Management: These issues deal with staff resistance, barriers to change and 311 implementation considerations

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
WORKLOAD		
Off-hour Calls Off hour calls may increase volumes referred to specialists (i.e. increase their morning voicemail backlog)	Intermediate, affects mainly 'take and transfer' calls and partial	▪ Increased after hour Departmental voicemails from 311 should be offset by the calls fielded and handled by 311 ▪ Until the actual "future state" can be reviewed and the magnitude of this issue assessed, it is suggested that Departmental service level requirements for call backs are lengthened (e.g. to 12 hrs) to ensure workloads are not significantly increased. This would give the specialists more time to complete the call back and provide more control over their workload scheduling
Increased Complexity 311 will add an extra step to most call types	Intermediate, adds steps to Partial and T&T calls	311 will not handle T&T service requests, therefore the extra step of transferring will be required. However, it is anticipated that Citizen service will still be improved on these calls as they will always "get to the right place" and will only have to tell their "story once" as information taken and provided by 311 will be passed on to the Department with the call

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
WORKLOAD		
Dispatch Is it realistic to have 311 dispatch? The 311 centre will not have access directly to the "front line" to know who to dispatch to	Intermediate, affects only those calls requiring dispatch	▪ Designating dispatch calls as partial calls will allow a customized approach on a call by call basis ▪ Future consideration should include a review of this area to assess the value of creating a central dispatch that handles all City dispatch functions (rather than individual Department dispatchers) which may result in further efficiencies and provide backup functions when required ▪ Furthermore, co-locating all dispatch functions within the 311 Centre would facilitate strong communication between the call takers and dispatchers, and establish a direct conduit for urgent or emergency issues
Counter Duties Current CSRs back up counter work. How will this be managed in the future?	Intermediate, affects those with counters and non dedicated counter staff	311 will not provide a counter service. Negotiations must occur with each Department where current day CSRs provide back up to determine the number of staff that must remain with the Department and the workload they will retain/gain if they are no longer taking calls
Seasonal Workload Issues Some SRs are seasonal and will create large customer service risks if not implemented into 311 carefully	Minor to Intermediate, only a few areas are seasonal, but these could affect the entire 311	Seasonal SRs will be documented with expected workload estimated. Individual implementation plans will be developed to ensure these areas are not being transferred to 311 at peak workload time. Where possible, seasonal SRs will be migrated into 311 in advance of the season as there will be a tendency for Citizens to call 311 regardless if the SR has been "formally" incorporated into 311

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
WORKLOAD		
Reduced Department Service Level Staff reduction in Departments could result in reduced Departmental service levels	Considerable, affects all areas	▪ Both staff and associated workload will move to 311, therefore the Department should not see their service levels decrease ▪ Full Call Equivalent will be calculated and required staff will remain in Departments ▪ Increased "specialist" workload estimated at no more than 10%, must be tracked and built into total cost of service
Reduced 311 Service Level Service levels not balanced, Citizens can't get through. Citizen experiences varied service levels when they call other parts of the City	Considerable, affects all areas	▪ A workforce management expert has been built into the new organizational design to ensure level loads. ▪ Peaks and valleys will be managed resulting in improved service to Citizens

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
SERVICE QUALITY		
Outbound Calling Outbound calls are usually required because there is a problem. Significant complexity around resolution exist	Minor, affects few calls	▪ Since outbound calls can be made at the discretion of the City (within acceptable turnaround times) problems can be thoroughly investigated prior to the call. Therefore, more flexibility is available when addressing these issues than those related to inbound calls. One of two strategies could be followed ▪ Create specialists within the 311 centre who focus on call-backs and are provided with Department resources (contact names, full access to specialized systems) to assist. This strategy is recommended if the originating call came into 311 and now requires a call back ▪ All call backs are handled by the Departments. Department specialists will be responsible for researching the issue and contacting the Citizen. This strategy is recommended if "true" outbound calls are being made e.g. proactive calls to Citizens e.g. dog licence renewal, not a call back

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
SERVICE QUALITY		
Keeping 311 Current Changes occur in the business and 311 will need to remain current	Considerable, affects all areas	▪ Departments making changes to processes or policies will need to inform the 311 Centre of the changes. Change protocols should be included in the SLAs between the 311 Centre and all Departments. To ensure the changes are communicated and implemented in a timely manner, a Department liaison position should be created within the 311 Centre (e.g. knowledge management person). A key role of the position will be to act as the point person for 311 on any change initiative ▪ In addition, having one main information system for all of 311 will allow for quick and consistent updates to the knowledge management system. Changes to policies or information will be quickly updated through central control of information ▪ A further consideration is to have a primary contact/liaison position in each Department to ensure all Departmental changes, issues and concerns are brought forward to 311 in a timely manner so as not to affect Citizen service

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
SERVICE QUALITY		
Training 311 will need to ensure proper training is provided	Considerable, affects all areas.	▪ Both initial and ongoing training are essential to the success of the 311 Centre. Initial training of 311 CSRs should include: ▪ 311 Orientation ▪ Telephony Systems ▪ Knowledge Systems ▪ Customer Service ▪ Service Request Procedures ▪ Escalation Procedures ▪ The use of Department specialists to assist in the Service Request Procedures modules is strongly recommended. ▪ To ensure initial and ongoing training is consistent with Department needs and information, it will be required that all relevant Departments be consulted during the training development stage and the final training on SRs procedures be signed off by the relevant Departments before being delivered to the 311 staff. The process maps documented during this phase of the project should act as the foundation for 311 training

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
SERVICE QUALITY		
Breadth of Knowledge CSR's are stretched just to handle the breadth of knowledge required currently. How can 311 CSR's be expected to know "everything"?	Considerable, affects all areas	▪ 311 CSRs will not be expected to have all City information and procedures committed to memory. CSRs will be provided with supporting tools designed to facilitate the fulfillment of service requests. Automated systems with knowledge management software will prompt the CSR proactively on "what to do and what to ask" and will allow the CSR to access additional information easily. Using key words, decision trees and drop down lists, CSRs will have the ability to access any information they need in a quick and efficient manner ▪ Built in edits and process reminders will guide the CSRs through service request processes and prevent them from skipping required procedures
Customer Service How will 311 ensure that all the CSRs are providing high quality and accurate service?	Considerable, affects all areas	This is an extremely important as 311 CSRs will be the "front face of the City" It is critical that high quality and accurate service is provided to avoid complaints and call backs. 311 will have an ongoing quality monitoring program and associated coaching and training program to ensure Citizens are continuously provided with high quality and accurate service
Service Gaps While the 311 is ramping up, skill set gaps may exist, handoffs of non-311 calls or Departmental specialists maybe challenging and workforce management efforts may be lacking leading to reduced service levels resulting in Citizen dissatisfaction	Considerable, affects all areas	Increased satisfaction through increased accessibility, consistent service level, easy access point, "one and done" approach. Handoffs and SLAs are documented prior to going live and effective training is delivered. A comprehensive training plan has been developed and detailed "hand offs" and SLAs must be developed

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
SERVICE QUALITY		
Universal Agent Concept Ineffective 311 staff not able to effectively serve on a "one and done" approach and Citizen experiences many transfers within 311 or to Departmental specialists. If this continues, Departments will not be able to handle volume of calls	Considerable, affects all areas	311 staff are effectively trained and enabled with the necessary supports to effectively serve a multi-service client in a *'one and done'* approach. Citizen satisfaction improves as they do not have to call many numbers to resolve multiple issues
Staff Morale Productivity decreases as staff feel undervalued or that the organization is creating a "sweat-shop"	Considerable, affects all areas	Productivity improves as agents are able to deal with more requests within a single call or handle more single issue calls through improved desktop functionality and telephony, effective quality call management and coaching/training program
Reduced Responsiveness Increased responsiveness does not occur. Responsiveness is not sufficient and Departments begin to feel isolated and "dumped" on.	Considerable, affects all areas	Metrics will be established and measured against in 311. An Performance Measurement expert has been built into the 311 organization

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
CHANGE MANAGEMENT		
Confidential or Protected Information 311 will need to protect certain information	Minor, affects few calls.	▪ Confidentiality is a priority for any organization dealing with private information. All 311 CSRs should be required to sign a confidentiality agreement ensuring no disclosure of any personal information with anyone (excepting supervisors where assistance is required to complete a service request). Strict penalties (e.g. termination) should be levied for non-compliance. 311 staff will also be trained in privacy legislation. ▪ Should the City determine that certain types of information cannot be used/viewed by a 311 Agent, protocols will be developed to ensure service requests dealing with the sensitive information are handled only by designated personnel (e.g. routed to a specialist team within 311)

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
CHANGE MANAGEMENT		
Loss of Familiarity/Trust Expect to lose some of the teamwork between CSR's and specialists since they work in the same area and know each other now	Intermediate, affects some service requests more than others	▪ While it is difficult to recreate the teamwork aspect of CSRs and specialists working in the same physical area, it is possible to build some level of familiarity among the 311 Centre and the Department specialists ▪ Using an exchange program format, with regularly scheduled "meet and greets" will allow 311 Centre agents the opportunity to visit Departments, meet the specialists and discuss service request handling. Department specialists would also have the opportunity to visit the 311 Centre ▪ This type of program will provide the opportunity for staff to meet face-to-face and become familiar with the roles of the 311 Centre and the Departments ▪ In addition, the 311 and Departmental liaisons should meet regularly to discuss any outstanding issues or areas of concern
Reluctant Staff Staff may be reluctant to move to the 311 centre	Minor to Intermediate, early indication suggests that some staff view the move to 311 as a positive	Communication should continue to ensure that staff awareness of 311 continues. 311 will offer a new and in some cases improved physical work site. There will be additional career enhancement or advancement opportunities within 311 (team leads, trainers) and staff will have the opportunity to learn more
311 is not driving the business 311 cannot drive nor manage the business, the Departments must continue to do this	Considerable, affects all areas	It is not the intended scope for 311 to drive or manage the business decisions. The Departments will be responsible to set the service levels and policies for 311. 311 will pass on issues of concern from Citizens with Departmental service, it will be up to the Departments to respond to these concerns

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MIGRATION ISSUE	POTENTIAL IMPACT OF ISSUE (if not mitigated)	MITIGATION STRATEGY
CHANGE MANAGEMENT		
Staff Overwhelmed Staff feel "too much too fast" and are overwhelmed by it all. Staff begin to "shut down"	Considerable, affects all areas	Staff are highly skilled in multiple areas leading to increased staff satisfaction levels

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Training Plan

The following table illustrates the recommended approach to 311 training and implementation. The approach maximizes change management opportunities by ensuring that all staff are involved with 311 prior to actual "go live" dates for their Department and by gaining exposure to various Departmental areas (cross training) as soon as possible. The following legend should be referred to when reviewing the 311 Training and Implementation table that follows.

Development of flex questions and SLA	
Receive 311 training	
Backfill for Department who are receiving 311 training using flex questions	
Move to 311	
Not impacted	
Conduct 311 training for Departmental Specialist	
311 fully implemented	

Wave	First Three Months (begins during Mobilize Phase)	Next Two Months	*Next One Month "311 Soft Launch"*	Next One Month	Next One Month	Next One Month	Next One Month	Next One Month *"311 Fully Implemented"*
Wave 1								
Wave 2								
Wave 3								

In order for 311 to work, there must be a significant cultural change. 311 staff must embrace the move to 311 as a positive opportunity to be the front face of the City to all Citizens. They must understand the importance of their role and how their individual performance directly contributes to the overall quality Citizen service. Staff will learn from their peers and management. Consequently, staff will only see this as a positive step if all levels of management demonstrate support for all decisions that are made, even if they still believe that their call centres should not have been consolidated. Once the decisions are made, everyone must work towards the success of 311.

A number of processes need to be adapted or formalized and input into a knowledge management system. The knowledge management system will require:

- Standardize definitions on work flow and "categorizations" i.e. how to categorize a complaint
- Process maps and logic maps of "how to do things"
- Comprehensive FAQs
- Development of common Citizen scenarios

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- A process that ensures that accurate and timely data/information is available (new or changed procedures, laws, legislation, policy)

The Quality Call Description will require:
- Easy to understand standards/expectations for 311
- Built in "call handling procedures" to ensure quality and appropriate length of call
- A supporting coaching process

Service Levels will require:
- A process for SLA negotiations that does not require significant time or attention to monitor adherence and co-operation between 311 and Departments
- Clearly defined expectations and response levels
- Articulated "hand off" protocols and process (when does an issue get transferred?)
- Rules/protocols around service dispatch

A number of required new procedures for the 311 program fall under the category of Workforce Management:
- Scheduling & Forecasting process
- Sign-on Agreement/Login standards
- Performance measurement process
- Change Management process

To effectively implement 311 in CoW, it is critical that staff are fully trained and that training be maintained on an on-going basis. Staff knowledge, ability to use technology, and customer service skills form the backbone of an effective call centre and are skills that must be built over a period of time. The following provides the program structure and curriculum for both agents and management staff.

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311 Staff Training Requirements	
The City of Winnipeg Orientation	City Vision, Mission and Mandate
	Citizen Care Mission
	City organizational structure
	Departmental roles ▪ Understanding of Departmental functions and service
	Role of 311
	Taking ownership of the Citizen call
	Freedom of Information Act
	Emergency Operations Procedures (bomb threats, evacuations, etc.)
	Benefits entitlement
	Reporting absence & late (where & when to call)
	Cultural and Age Sensitivity Training
	Your Rights in the Work Environment
Citizen Escalation Process	Before you escalate
	When to escalate
	Capturing effective notes
	Escalation documentation
	Escalation tracking
	Service level commitments
Baseline Citizen Service Training	Communicating Effectively ▪ The impact of attitude on Citizen care ▪ Interacting effectively with Citizens and the City ▪ Effective communication skills throughout the contact
	Developing communications skills ▪ Speaking and listening skills ▪ Questioning skills ▪ Call control skills
	Building call rapport ▪ Effective introductions, staying in control ▪ Effective listening and call management techniques ▪ Professionalism
	Negotiation process ▪ Dealing with difficult Citizens ▪ How to use questioning and listening skills ▪ Advising what the City "can do for them" ▪ Effective closings
	Outbound skills • Preparing for the call • Capturing the Citizen's attention and delivering the key messages

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311 Staff Training Requirements	
Quality Service	Quality calls ▪ Quality Call Description ▪ Transferring calls ▪ Quality listening program understanding ▪ Number of calls and frequency of monitoring ▪ High quality call samples ▪ Monitoring Program protocol ▪ Feedback and coaching process
	Quality eMail ▪ Quality eMail description ▪ Acceptable format ▪ Quality sampling process ▪ SLAs
	Quality Fax ▪ Quality fax description ▪ Acceptable format ▪ Fax cover sheet formats ▪ SLAs
	Quality Mail ▪ Quality mail description ▪ Expert responses ▪ SLAs
Performance Management	Understanding Key Performance Indicators (KPIs)
	Understanding coaching
Systems Training	311 system training
	Departmental system specific training (How it impacts 311)
	Email system training
	Software requirements training
SR and Knowledge Training	Departmental specific knowledge
	SR training
	Knowledge Management training
	SLA training

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311 Management/Supervisor Training Requirements	
Coaching Introduction	The Principles of coaching
	Developing a coaching process
	Understanding learning styles
	Coaching Agents one-to-one
	Introducing coaching into the 311 Centre
	Coaching and Performance Management
Performance Management	Understanding Key Performance Indicators (KPIs) ▪ Productivity AHT ▪ Availability to Serve (Occupancy) ▪ Quality and accuracy rates ▪ First Call Resolution (FCR), Abandonment rates and Transfer rates ▪ Absence and comportment
Understanding Call Centre Technology	ACD Utilization and reports
	Queuing dynamics
	Real Time Displays
	Reader Boards
	Display Ribbons
	Overflows and Interflows
	Time of day routing
	IVR
	Skills based routing
	Multi-Queue routing
	Universal Queue capability
	Web functionality
Service Level Management	General SLM ▪ Resolution of cases and escalations ▪ Voicemail call backs ▪ Fax processing ▪ Email response ▪ Mail response ▪ Management referrals ▪ Responses to councillors
	Inter-Departmental (SR) Management ▪ Ownership of the SR, SLA requirements ▪ Escalation procedures ▪ SME call back standards
Workforce Management	Scheduling and forecasting
	Management role, Workforce Management Team role
Labour Relations	Training and overview

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Web Migration

Web self service provides an opportunity to further reduce costs and improve customer satisfaction. Not only does the web provide increased Citizen service e.g. availability of 24x7, it also provides for the opportunity for significant savings. Current industry data clearly demonstrates that the web self channel is significantly less expensive than other channels. Relative to telephone transactions, web self-service is approximately ten percent (10%) the cost.

Although not part of the costs to implement 311, the Web should be considered as soon as feasible. The expansion to multiple channels is increasing in all areas of the public sector. Care must be taken to ensure that migration to the web occurs only when this channel can provide accurate and timely information and is able to complete the full SR. If this does not occur, Citizens will contact the 311 to gain additional clarification, and costs to serve will increase, with corresponding decreases in customer satisfaction. Increasing the opportunity for self-help increases the number and complexity of inquiries in the telephone channel for a short period of time. Over time these inquiries will decrease and efficiency savings will kick in.

As all current day SRs are mapped and enable easier web self serve solutions to be developed, we recommend that the City launch a project to evaluate the added impact (cost and time) to introduce the Web channel through a phased- in approach (e.g. begin with basic SRs) parallel to implementation of the 311 project.

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