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The Corporation of the Town of Niagara-on-the-Lake Information Report to Council

SUBJECT: Modernization of the Service Request Database
DATE: Click or tap to enter a date.
REPORT #: CAO-24-012
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BACKGROUND INFORMATION

In 2012, the Town's Public Works Division was established and began utilizing a Service Request database (also known as a Workforce System), which was later adopted corporate-wide in 2014.

This database has been instrumental in managing work plans and customer information, logging requests, tracking processes, and recording actions taken. Since its inception, the system has not been updated significantly despite the Town receiving an average of 1400 service requests per year.

Recognizing the importance of delivering exceptional customer experience and effectively meeting the needs of our community, a Lean Process review of the Town's Service Request process was conducted in 2022. The assessment concluded that while the existing software housing the Service Request database was sufficient, several process adjustments were necessary to optimize its functionality. This led to the introduction of a new database, rebranded as the Service Delivery database, which modernizes and streamlines our service delivery process.

Funding for this transformation project was available through the Ontario Municipal Modernization Program, Intake 3 – Implementation Stream (MMP3).

Executive Summary:

This Information Report provides an overview of the Town's efforts to modernize and streamline the Service Request system.

Key details include:

- Project completion in Q4 of 2023, within the allocated budget of \$15,000 provided by MMP3 Funding.

- The successful launch of the new Service Delivery database on January 2, 2024, meeting both timeline and budgetary expectations.
- Significant project milestones achieved, including Council endorsement of MMP3 in March 2022, finalization of the Project Charter in March 2023, Staff engagement in April 2023, and various other stages leading to the launch on January 2, 2024, and project closeout in March 2024.

Notable database improvements include:

- Introduction of a new web form on the Town's website.
- Implementation of three request types (Customer Issue, Request for Service, and Request for Information) to enhance service and establish more accurate Key Performance Indicators.
- Integration of new decision trees to facilitate accurate request assignments and minimize errors.
- Introduction of additional status options to provide customers with clearer insights into request progress.
- Implementation of batch processing capabilities to reduce staff time on administrative tasks.
- Introduction of a new Service Request Tracker with visual tracking features, improving communication with customers.
- Enhanced metrics collection to support improved analysis and decision-making processes.

These improvements are a significant step forward in enhancing service delivery and customer experience. They directly support the Council's Strategic Plan, particularly under the "Optimize Organizational Excellence" pillar, emphasizing the importance of streamlining and modernizing our operations to serve our customers better.

Budget:

In 2022, the Town received \$122,366.00 for the Municipal Modernization Program, Intake 3 – of which \$15,000 was allocated to the CRM project.

EXPENSES	Budgeted	Actual	HST 1.76%	Total
SRDb 2.0	\$ 15,000.00	\$11,702.40	\$ 202.40	\$ 11,904.80

The project was successfully completed within the budget allotted by the MMP3 – Implementation Stream funding.

Issues & Opportunities:

During the initial two months post-launch, minor issues were anticipated as Staff acclimated to the new processes and database. The Project Team recorded reported issues and promptly addressed them by implementing minor changes to the database and providing additional staff training where necessary.

Challenges encountered during the project rollout included limited Staff availability to test the new system thoroughly during the soft launch phase.

As part of the project close-out meeting, opportunities for improvement were identified, and a 'lessons learned' document was created to guide future town projects. Insights provided through this initiative emphasized the importance of establishing clear terms of reference for project team members and ensuring sufficient time for soft launches to facilitate thorough testing procedures.

Efficiencies:

Exceptional customer experience extends beyond the Customer Experience Staff; it is a collective goal for the entire organization. Introducing the new Service Delivery Database benefits the Town in two distinct ways:

- Soft benefits, which are challenging to quantify, encompass enhanced trust, improved collaboration, better communication, and streamlined inter-departmental coordination. It is anticipated that the return on investment for the Town could become evident within 6 to twelve months following the implementation of the new Service Delivery database.
- Hard benefits include a significant decrease in rework and hidden inefficiencies across all departments. This enhanced efficiency has the potential to reduce lead times by 10-15% within a year of the database's effective deployment.

NEXT STEP / CONCLUSION

With the conclusion of this project, the Service Delivery Database has transitioned into the regular operations phase. Moving forward, Staff will continue monitoring data and gathering feedback from both internal and external customers. These efforts will be integral to our commitment to continuous improvement, ensuring that our processes evolve in alignment with the needs of our community and organization.