

<b>TO:</b>	<b>CHAIR AND MEMBERS STRATEGIC PRIORITIES AND POLICY COMMITTEE MEETING ON APRIL 14, 2014</b>
<b>FROM:</b>	<b>LYNNE LIVINGSTONE MANAGING DIRECTOR, NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES</b>
<b>SUBJECT:</b>	<b>SERVICE LONDON UPDATE REPORT</b>

<b>RECOMMENDATION</b>
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That, on the recommendation of the Managing Director of Neighbourhood, Children and Fire Services, the following actions **BE TAKEN** with respect to the Customer Relationship Management software system and the Service London Business Initiative:

- a) the update on the Customer Relationship Management (CRM) software system **BE RECEIVED** for information; and
- b) the next steps associated with the Service London Business Initiative **BE ENDORSED**.

<b>PREVIOUS REPORTS PERTINENT TO THIS MATTER</b>
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- Report to Finance and Administration Committee, May 18, 2011
- Report to Finance and Administration Committee, September 28, 2011
- Report to Finance and Administration Committee, January 16, 2012
- Report to Strategic Priorities and Policy Committee, October 29, 2012
- Report to Strategic Priorities and Policy Committee, December 4, 2012
- Report to Strategic Priorities and Policy Committee, December 16, 2013

<b>BACKGROUND</b>
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The purpose of this report is to provide an update on two deliverables associated with the Service London Implementation Plan: the Customer Relationship Management software solution and the Service London Business Initiative.

Service London is a transformative initiative that places the customer at the centre of service delivery and planning. This means enhancing and improving the delivery of customer services through the modernization and integration of our customer service channels (online, telephone, in-person) and working collaboratively with other organizations to deliver services that are simple, seamless, personalized and accountable.

## DISCUSSION

### **CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM**

A Customer Relationship Management (CRM) system is a critical component of Service London. CRM software is at the centre of our drive to modernize and integrate our customer service channels (online, in-person, and telephone) and is a key enabler in providing customer experiences that are simple, seamless, personalized and accountable. Specifically, CRM software allows for enhanced workflow management by creating, assigning and tracking all interactions with our customers and houses a robust database that will be accessed by all call-takers, allowing for real-time access to the most up-to-date and relevant information about the services we provide. It will also be used to manage service requests from start to finish through integration with work order and other back-of-house systems, which supports business process improvements and the tracking of performance indicators.

As noted in the December 16, 2013 Service London Update Report, Civic Administration has been actively engaged in the evaluation and selection of a CRM solution. In depth research on industry best practices, including engaging municipal counterparts using like systems was conducted and built into the Request for Proposal (RFP) process.

As a reminder, this RFP called for a comprehensive package that included all CRM software, an Enterprise Service Bus, any new hardware and the necessary consulting services to assist with implementation. Six compliant bids were received and two proponents were shortlisted. Reference checks, site visits, confirmation of hardware and software requirements and budget analyses were conducted. At the conclusion of this extensive evaluation process the RFP was cancelled on January 15, 2014 when it was determined that the submissions neither fulfilled the project requirements based on budget and timelines, nor did they address our immediate and long-term goals.

#### **Next Steps**

Based on this experience, the City has been able to further refine the scope and requirements of our CRM. In May, the City of London will be requesting proposals for an implementation partner for Phase One of our CRM project. This phase will involve the configuration and deployment of Microsoft Dynamics CRM (version 2013) in two pilot areas: Business Services Division, Development and Compliance Services and City Clerk's Office, Legal and Corporate Services.

Through the previous RFP process, Microsoft Dynamics CRM has been identified as the software product that best meets the needs of our organization. Dynamics is used by many government entities, including: Brampton, Ontario; Barcelona, Spain; Birmingham, Alabama; London, England; and, Grand Rapids, Michigan and provides the following advantages:

- affordable and flexible software solution that is compatible with our current technology environment where Microsoft is one of our primary platforms;

- seamless and familiar user experience for City staff because it is a Microsoft product and connects with other Microsoft products (Microsoft Outlook, Word, Excel, Powerpoint);
- ability to purchase through the City's Enterprise Agreement with Microsoft;
- leverages existing expertise and experience within Information Technology Services;
- a wide range of out-of-the-box capabilities, including service request tracking, workflow management, call scripts, citizen web portal, mobile access and interactive mapping through our Geographic Information System (GIS);
- can be installed now as an on-premise solution with flexibility to move to cloud-based technology, where appropriate, in the future;
- functionality that will allow for streamlining and/or phasing out of older systems and applications; and,
- key technology enabler that will assist in the delivery of simple, seamless, personalized and accountable services for Londoners.

In conjunction with the first phase of this project, the City is undertaking a number of complimentary initiatives:

- The City will be participating in exploratory sessions at Microsoft Canada's Technology Centre in Mississauga;
- The City will continue to actively collaborate with the City of Grand Rapids to gather best practices and learn from their experiences in implementing and managing Microsoft Dynamics technology; and,
- The City has engaged Western University's leading experts on big data and smart cities to ensure that we are building a CRM that meets our current needs and is a long-term and viable solution for the future.

Through the application of such an approach we believe that we can still meet the key deliverables identified in the Service London Implementation Plan for 2014, 2015-2016.

## **SERVICE LONDON BUSINESS INITIATIVE**

Providing business customers with great customer experiences and demonstrating that we are 'Open for Business' is a priority for the City of London. In 2013, a cross-functional team was established to implement Service London Business, an initiative focused on delivering collaborative, wrap-around customer experiences through the creation of enhanced navigational tools and a single point of access. The provision of such experiences can be achieved through three mechanisms: 1) Building Content; 2) Establishing a Physical Presence; and, 3) Establishing a Team. An update on each is provided below.

### **1. Building Content**

This mechanism is focused on building and improving the content available to our business customers via our print, online and in-person channels. A Restaurant roadmap was released in December 2013 which outlines the many steps, service level expectations and critical success factors along the journey of opening a restaurant. To date the feedback regarding the Restaurant guide has been

overwhelmingly positive.

Building on the work of the Open Ontario Compliance Initiative, and in order to support the work of the Service London Business team, the next roadmaps to be developed are bars/nightclubs, convenience stores and a broader navigational support document – ‘Building 101’. These documents will be released (print, online and in-person) in June to correspond with the launch of the physical space. The latter part of 2014 will see the development of roadmaps for hair salons, contractors and auto garages.

## **2. Establishing a Team**

In order to improve the customer experience of our business customers, a Planner has been seconded to the Service London Business team. The addition of a dedicated resource is a visible first step toward developing a more seamless business service model. Situated on the First Floor of City Hall, this position will be a first point of contact for business customers, proactively providing guidance, navigational support and expectations that are tailored and personalized to their individual needs. This will require establishing meaningful and collaborative relationships with both internal and external partners. The initial scope of the role will be focused on small and medium-sized entrepreneurs looking to start, run or expand a restaurant, bar/nightclub or convenience store. This scalable approach will allow for rigorous monitoring and evaluation and the flexibility to learn and adjust as required. Based on the evaluation of this role, Civic Administration will report back to Council and make recommendations for moving forward on a more permanent basis.

To assist with this initiative, a number of key staff working in Development and Compliance Services, Environmental and Engineering Services and Planning Services have been identified as key contacts (including back-up staff) to be available to assist with business-related matters. This approach will further add value to the Service London Business Initiative by quickening the pace of connecting customers with the specific knowledge and expertise they require.

## **3. Establishing a Physical Presence**

Civic Administration has been actively engaged in developing a functional plan and design for the First Floor of City Hall. A presentation on the space will be provided at the April 14, 2014 Strategic Priorities and Policy Committee. By making changes to and investments in this space, we can create a welcoming and vibrant environment that facilitates collaborative, wrap-around experiences for our business customers. Significant features of the space include:

- a design that is agile, sustainable and accessible through the use of modular system walls and furniture;
- enhanced seating capacity and collaborative work and meeting spaces equipped with convenient access to power and data, including wifi;
- dedicated and accessible workspace for Service London Business (Planner);
- space to house business-related materials (roadmaps, agency information, forms, etcetera);

- hoteling space for staff and agency partners, further promoting the delivery of collaborative, wrap-around customer experiences;
- redesigned front counter that is welcoming and equipped with ergonomic workstations and technology, including a Point of Sale system;
- enhanced service offerings for our business customers, including: Planning applications, bulk water cards, backflow prevention program inspector tags, 911 stickers for taxis, noise exemptions;
- enhanced service offerings for all customers, including: London Transit smart cards, gift cards, dog and cat licence renewals, Waste Reduction and Conservation calendars, Bike Maps;
- visible presence for Service London Office;
- upgraded energy efficient lighting and enhancements to the heating system throughout the space; and,
- space to proactively advertise City of London programs, events and services.

In addition, the following agencies, through the Open Ontario Compliance Initiative and other collaborative initiatives, have agreed to explore participation in the Service London Business Initiative: Alcohol and Gaming Commission of Ontario, London Economic Development Corporation, London Fire Services, London Police Services, Ministry of Finance, Ministry of Labour, Middlesex-London Health Unit, Ministry of Community Safety and Correctional Services (Private Security and Investigative Service Compliance Unit), Small Business Centre. The level of participation – from sharing information to utilizing the hoteling space – will be determined through the progression of the project.

The estimated cost of this work is approximately \$180,000 and will be funded through reserves on the recommendation of the Managing Director, Corporate Services and City Treasurer, Chief Financial Officer. Construction will begin in early May and continue to the end of June. Temporary space will be provided for the existing concierge services allowing them to be continued with minimal disruption during the construction period. The grand opening of the space is tentatively scheduled to take place in late June.

<b>CONCLUSIONS</b>
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Service London is a transformative initiative that places the customer at the centre of service planning and delivery and is a key mechanism in the delivery of Council’s mission to be “At Your Service: a respected and inspired public service partner.”

Regular updates will continue to be provided to Council as this work proceeds.

<b>PREPARED BY:</b>	<b>RECOMMENDED BY:</b>

<b>ROSANNA WILCOX MANAGER SERVICE LONDON</b>	<b>KATE GRAHAM MANAGER CORPORATE INIATIVES</b>
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<b>RECOMMENDED BY:</b>	<b>RECOMMENDED BY:</b>
<b>LYNNE LIVINGSTONE MANAGING DIRECTOR NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES</b>	<b>JAY STANFORD DIRECTOR ENVIRONMENT, FLEET &amp; SOLID WASTE</b>

- cc. Art Zuidema, City Manager  
 Senior Leadership Team  
 Operations Management Team  
 Cathy Saunders, City Clerk  
 Mat Daley, Interim Director, Information Technology Services  
 Carol-Lynn Chambers, Project Manager, Open Ontario Compliance Initiative

