Customer Service Strategy

IMPLEMENTATION PLAN

STRATHROY-CARADOC

URBAN OPPORTUNITY – RURAL HOSPITALITY

Customer Service Strategy Implementation Plan

Vision: The Municipality of Strathroy-Caradoc offers seamless, responsive and an exceptional experience for every customer.

Mission: The Municipality of Strathroy-Caradoc will ensure that customers receive service in a reasonable amount of time, interact with knowledgeable staff who have the necessary tools, training and resources to provide an accurate response upon first contact.

Guiding Principles:

These guiding principles are the foundation for the strategy. it is important to recognize the intricacy of each interaction. In many cases, a solution involves more than one department and a coordinated approach.

Be Adaptable | Be Empathetic | Be Knowledgeable | Be Solution Based | Be Accessible

Core Pillars

Stronger Together
We value our staff and our community, working in partnership to build trust and deliver great service.
Customers and Municipal staff feel supported, respected, and connected.

Service Excellence
We set and uphold high standards to ensure every interaction is professional, consistent, and fair.
Customers and Municipal staff know what to expect and trust the quality of service they receive.

Clear Connections
We communicate openly, clearly, and accessibly across all channels.
Customers and Municipal staff stay informed, feel heard, and trust our transparency.

Smart Solutions
We use tools and technology that make services simple, efficient, and effective.
Customers and Municipal staff experience faster responses and smoother interactions.

Stronger Together - People

We value our staff and our community, working in partnership to build trust and deliver great service.

IMPACT: Customers and Municipal staff feel supported, respected and connected.

The central piece to effective customer service is the people. The Municipality of Strathroy-Caradoc is fortunate to have a diverse mix of specialized staff that deliver municipal services. Currently, limited staff dedicated to departmental municipal service, which will challenge future Customer Service. In many municipalities, a dedicated Customer Service there are dedicated department led customer service agents that are centrally located. To achieve the objective of enhancing customer experience, staff capacity must be added. A centralized Customer Service location within the Municipality of Strathroy-

Caradoc is the most efficient way to serve customers. A one-stop facility, where Customer Service Staff along with the ability to house departmental staff when required is key to offering optimum service. The location of the department remains to be confirmed. The current Customer Service location is not ideal to adequately support additional staff and offers no privacy to handle delicate customer service issues. A more prominent, accessible location in the Downtown core would be the optimum location for the Customer Service Centre. This will allow for the expansion of the department in tandem with growth of the community.

The Locations

The locations of the Customer Service staff are as important as the people with centrally located, accessible locations provide convenience for our customers. Ease of parking and access to other services will provide a first impression to our customers that adds to their overall customer experience. Visiting Municipal Halls can be a daunting experience for those who are not accustomed to having to deal with municipal business. A visible, dedicated neutral location that is central and welcoming ensure that customers know they are our # 1 priority when entering the facility.

Location # 1 Strathroy

137 Frank Street concepts were presented to Council in June of 2025. The concept included a central customer service concept that was accessible and offered opportunities for stakeholders and private business to be centrally located to provide more fulsome, community service. While conceptual, it is recommended that Council pursue the development of drawings to accommodate the enhanced customer service location with flexibility for phased development of the remainder of the space.

A Council report will be brought forward to staff in Q4 2025 for further direction on 137 Frank Street.

Location # 2 Mount Brydges

Recognizing the need to add a second location has been addressed through locating a remote Customer Service Centre within the Mount Brydges library for a pilot project to determine future needs. This location provides a welcoming environment and the ability to carry out municipal business without the trip to Strathroy.

Hours of Customer Service

Currently, customer service is available from 9 am- 4pm – Monday to Friday at 52 Frank Street. Expanding Customer Service Hours may be an option through the possibility of offering flex hour options to staff to cover longer hours when additional Customer Service Representatives are recruited. For example, staff could have the ability to work four 10-hour shifts that would overlap but extend hours from 8 – 6 five days per week. This would only be possible if staff levels were adequate to address the hours but a possibility in the future.

Customer Service Feedback

An opportunity for customers to provide feedback through an input form will allow for continual improvement of service. A form will be accessible to all customers and encouragement to complete the

exercise will be undertaken through promotion of the option to provide feedback. Participation by the pubic could be encouraged through promotions.

Training

To provide excellent customer service, employees must have a foundation of corporate knowledge. The Municipality currently provides solid onboarding that includes information about HR policies and legislated components such as WHMIS, AODA, and Cybersecurity. A gap exists in the corporate knowledge area that could include internal training for IT, Citywide, Finance, Budgeting, UKG, Communications, Customer Service, Escribe and Filehold as examples. Work with all departments could enhance the onboarding with department representatives highlighting important corporate policies and procedures on a more proactive basis.

The value of retaining institutional knowledge is invaluable to delivering excellent customer service satisfaction. By ensuring that staff are properly trained and equipped with a fulsome knowledge base is paramount to the foundation of customer service.

Core training would be provided through the HR department as it currently exists, and it is recommended that departmental training (i.e. Public Works Road Safety) would be provided through individual areas of the Municipality. This will ensure that ALL staff have some core knowledge of all municipal services. This will be in addition to the current HR online training components that are necessary parts of the onboarding process.

Municipal technology training for Office 365 as well as Citywide training would be critical to launching of systems particularly related to Customer Training.

Specific to Customer Service, training should be provided to front line staff who interact with customers on a regular basis. There are several different aspects of training such as EDI, dealing with escalation and de-escalation, Indigenous training and general Customer service training that should be delivered in a variety of methods including online and classroom. A regular schedule should be developed and made available to staff and Council to attend. A separate budget line should be developed to accommodate this type of training. There will be a requirement for dedicated Customer Service representatives to take in depth training for current systems such as Finance systems (for enquiries and payments), Cloud Permit and Community Service platforms for registrations and bookings back up. This will take some time for CSRs to become competent in municipal wide systems.

Measurement of the effectiveness of training will be tracked through Customer Service Feedback forms, as well as feedback from staff. The schedule and delivery methods will be adjusted according to feedback.

Corporate Culture

One of the most important investments in any corporation is the people. The success of corporate knowledge retention and enhancement is directly tied to staff retention. Turnover of staff has resulted in a loss of corporate knowledge that impacts Customer Service.

Creating a collaborative environment will engage staff and increase capacity through knowledge exchange. Interdepartmental communication could be enhanced through the implementation of scheduled staff meetings where multiple departments share current projects and opportunities for cross departmental collaboration. This increases the depth of the corporate knowledge base. By including all staff, the environment of inclusiveness is created which results in increased participation.

Earlier this year, T-shirts were distributed to full time permanent staff to kick off the Customer Service Strategy. The t-shirts were very popular and introduced the idea of supporting the municipal brand creating recognition in the community. Enhancing the municipal branding through clothing, identification and team activities will result in clear messaging, collaboration and pride of employment. A catalogue of municipal garments and swag will be provided to all departments to ensure consistency of branding moving forward. This enables the public to easily identify staff when on municipal property or dealing with on duty municipal staff.

Further in this report, mention of Office 365 implementation will address a portion of corporate communication. However, not all municipal staff have access to computers due to the nature of their work with the municipality. There still is a need to communication with all municipal staff from time to time. Currently, ALL staff and elected officials have access to UKG which serves as the payroll platform. In addition to payroll, UKG Talk is a communication platform that complement their system. UKG Talk would provide all municipal staff access to municipal information, and the ability to network with colleagues in a controlled forum. Once again, access to UKG Talk offers inclusiveness to all staff and elected officials. UKG talk allows groups to form for networking, special projects, idea generation and social activities while providing metrics and the ability to administer to ensure conformity to Municipal Communications Policy and standards. There is a nominal fee for the app that will be supported by the HR budget moving forward pending Council approval.

Team building exercises that include Staff and Council should be encouraged and arranged to ensure that engagement remains a priority for Management and Council. The content and frequency of these exercises would be created by a collective group of municipal staff like the Connection Crew.

An enhanced recognition program that is expanded beyond years of service could include additional achievements that celebrate staff and Council successes. Items such as shout outs, and celebrations through communication tools could provide encouragement for continuous improvement.

An onboarding kit that would include branded items such as notebook, pen, and id tag, nametag along with some online tools such as signature blocks, formatted out of office replies, the municipal service inventory and other corporate information would provide a new employee with consistent messaging that would align with the Municipality's key messages. This practice would add to the feeling of inclusiveness and the team culture

Guest speakers that are recommended through staff to share experiences from other communities is a cost-effective method that enhances skills from peers. This allows for knowledge exchange and transfer to enhance local capacity. Networking opportunities ensures engagement of staff at all levels.

Service Excellence

We set and uphold high standards to ensure every interaction is professional, consistent, and fair.

IMPACT: Customers and Municipal staff know what to expect and trust the quality of service they receive.

The most consistent comments throughout the consultation process for the strategy was the absence of customer service standards. Adopting Customer Service Standards will provide customers with information about what can be expected regarding response times in a variety of methods such as phone calls, emails, & written correspondence. While a relatively straightforward exercise, a set of standards should be adopted by Council. The Customer Service Standards recognize that not all service requests are straightforward but outlines response rates that may require further communication to address complex issues and requests. The standards do not supersede legislated timelines. Work with the Connection Team to develop standards, and as part of the process creation of expectations of the Customers has been included. This includes the use and enforcement of the RZone, a policy that has been used for the Municipality for some time. Promotion of the standards will be delivered through website, social media, and print once adopted. A recommendation to review the Customer Standards regularly should be considered.

Clear Connections

We communicate openly, clearly, and accessibly across all channels.

IMPACT: Customers and Municipal staff stay informed, feel heard and trust our transparency.

Pivotal to the Customer Strategy, how the Municipality communicates information to the wide audience of the municipality is one of four priorities of the Customer Service Strategy. The includes electronic, verbal and face – to face communication. The demand for timely information distribution has become almost instant as technology advances.

Through the consultation process, there was a common theme of not knowing where to locate information. One of the gaps that was addressed was the lack of a municipal service inventory. To plan continued improvement of customer service, it was important to identify and provide information on each service that is offered by the Municipality. The new inventory lists, describes and outlines the customer service process attached to the service. The inventory will be accessible to municipal staff and Council and will serve as the repository for consultation on services moving forward. A regular review of the document should be conducted annually or when a service has been added, eliminated or modified.

There is a total of 321 services documented in the inventory of which 123 are core services that have been identified as core services that are offered to the community. There is an opportunity for an additional 53 services to be supported by an enhanced Customer Service.

The Municipal Communications Policy is a living document that guides the way Strathroy-Caradoc communicates both internally and externally. An appendix to the Communications Policy is the General Website and Social Media Guidelines and Procedures which is also under review for the purpose of an update. Currently a review is underway and an updated version of an amalgamated Communications & Social Media Policy will be brought to Council for approval.

Website

The Municipality's primary source of constant communication is through providing as much information as possible through the website www.strathroy-caradoc.ca

The Municipality's adoption of the GovStack website platform in early 2025 marks a significant step forward in delivering accessible, efficient, and user-focused customer service. Designed specifically for the public sector, GovStack enables the Municipality to meet modern service expectations by making information and services more accessible, intuitive, and responsive.

The new platform offers User-Centered Design, Smart Search Functionality, Accessibility Compliance, and 24/7 Access to Services through online forms and service request functionality (Citywide integration) – eliminating barriers caused by traditional office hours. By implementing a ticketing system by Citywide via this new website platform, it allows us to improve Internal efficiency, offering the organization a centralized way to manage workflows and service requests.

Together, these features ensure a more seamless, transparent, and responsive experience for residents—supporting our commitment to delivering exceptional municipal service in a digital age.

Further improvements will be considered. Items such as Chat features and enhanced FAQs may be possible moving forward.

Video boards such as the ones at the Strathroy-Caradoc Police Services station and the arenas offer an alternative method of communication related to community programming and news updates. Adding to the inventory of the boards would allow for greater distribution of timely information. The messaging can be updated quickly and administered by the Customer Service team, so information remains relevant and timely.

Related to communications is technology that directs how the municipality manages information as well as disbursement of information that is helpful to the public and for specific enquiries.

Smart Solutions

We use tools and technology that make services simple, efficient and effective.

IMPACT: Customers and Municipal staff experience faster responses and smoother interactions.

Documentation is vital to mitigate further loss of corporate knowledge. Technology plays a vital role in automating process and documentation to ensure the knowledge base exists beyond staff.

Modernization of technology is an investment of the community to create efficiencies that result in cost savings corporate wide.

Priority # 1 – Microsoft Office 365 to improve internal communications

The launch of Microsoft Office 365 couples with adequate staff training will allow for more streamlined communication and project collaboration online increasing efficiency and decreasing email overload and housing of documents in several different versions at one time. Implementation of Office 365 is underway with completion scheduled into 2026 with no additional budget allocation related to Customer Service. The lead on this initiative is IT who have developed fulsome policies and protocol for the Municipality.

Priority # 2 – Build out Citywide Ticketing System for tracking issue resolution

Currently Citywide Ticketing is used for Environmental Services/Public Works as well as IT within the Municipal Structure. It makes economic sense to expand this service to allow for consistent requests for service throughout the corporation. Also beneficial to the municipality is to see history of tickets related to call for service. Tracking of resolution rates will be able to provide data for project and resource planning for the future. It is important to recognize that this is not a CRM, but a stepping stone to a more robust system when human and financial resources allow for this expansion. There is a set up fee of $12,600.00 for build out of the current system with a $2,000.00 annual maintenance fee for the system. The set-up fee will be included in the 2026 Operating Budget process and the maintenance fee will be included in the IT budget. This priority will address a portion of the tracking to create a baseline for monitoring and reporting related to customer service. It will also allow staff to see historical data related to reported issues and requests for service.

Priority # 3 -

Recommendations from IT include not pursuing the CRM at this time due to system limitations and the limiting factors related to capacity both IT and human resources.   In the research conducted with other municipalities, few had a corporate wide CRM. Of those that did, several did not use them to their potential and investment vs effectiveness did not present a robust case for Strathroy-Caradoc to invest at this time. Middlesex County is in the process of investigating the acquisition of such a system. There may be opportunity for future collaboration in this manner.

The need for a CRM should be revisited within two years.

Phasing of Strategy

2025

Q4 Customer Service Strategy Endorsed by Council Including Customer Service Standards

Q4 – Communications, Social Media, Branding Strategy Updated and Brought to Council for Endorsement

Q4 – Council Report re 137 Frank Street for further direction

Q4 – Location of Centralized Customer Service Centre confirmed by Council Direction

Q4 – Budget for Facility Modifications Determined and Included in Appropriate Budgets

Q4 – Onboarding Process Implemented with regards to departmental information

Q4 – Office 365 Training Commences – IT Lead

Q4 – Citywide proposal accepted

Q4 – Budget approval for Customer Service Staff

2026

Q1

Office 365 training for staff – IT Lead

Build out of Citywide System with Training

Establishment of Mount Brydges Office

Staffing – Add on FTE to work with IT and current Customer Service to implement Citywide-ticketing system. Part time presence in Mount Brydges

Establishment of Baseline Metrics for Customer Service

Q2 – Q4

Customer Service Training

Implementation of Citywide System

Customer Service Training for Municipal Staff

2027

Q1

Report to Council regarding roll out of program with metrics and recommendations.

Budget Requirements

Year				2026	2027	2028
Citywide Technology				14,250.00		
Corporate Technology				3,665.00	3,750.00	3,825.00
Mount Brydges Location						
Staff (new)				89,004.00	90,785.00	
Staff Furniture and Equipment				3,500.00	3,500.00	3,500.00
Video Boards				14,000.00	1,000.00	1,000.00
Training				20,000.00	20,000.00	20,000.00
Licenses						
Communication				2,000.00	1,000.00	1,000.00
Total				**148,445.00**	**122,062.00**	**31,353.00**
Staff - Wages				61,789.00	63,024.78	
Benefits				27,215.91	27,760.00	
Subtotal				**89,004.91**	**90,784.78**	
Total				**148,445.00**	**122,062.00**	**31,353.00**

Terms of Reference for Development Team – Customer Service Strategy

1. **Purpose** –The CSS team has been established to develop a customer service strategy for the Municipality of Strathroy-Caradoc. The customer service strategy will enhance customer experience at the Municipality of Strathroy-Caradoc.

2. **Objective**:

   The Team will:

   - Review current practices and services
   - Review trends and best practices related to municipal customer service delivery
   - Review municipal demographics and customer expectations
   - Development framework for strategy development
   - Consult with subject matter experts to support deliverables outlined in strategy
   - Develop strategy
   - Participate and coordinate focus groups
   - Report creation

3. **Membership** – The team shall consist of representatives:
   - Municipal Staff including SCPS
   - *Stakeholder Representative to be determined
   - *Industry Representative to be determined
   - Director of HR – resource
   - Subject Matter Experts if required (CRMs)

     *Discussion required about how to engage external reps

4. **Roles and Responsibilities**
   Project Lead – To set and coordinate meetings, to record proceedings, oversee team and coordinate work to create customer service delivery
   Team Members – contribute expertise to development of strategy
   Community Representatives to provide expectations and feedback
   Council for consultation and approval of strategy

5. **Meeting Frequency**
   The team will meet weekly to kick start project. To be confirmed in initial meeting.

6. **Decision Making Process**

Decisions will be made by consensus wherever possible. In the case of divisive opinions, a vote will be taken, and majority will rule.
Quorum will be 50% + 1 of the team; no decisions will be made without quorum

7. **Reporting**
Frequency of reporting will be determined by Team Lead and CAO with a schedule to be developed with milestones for Council reporting
Final report to be delivered by August 31, 2025

8. **Duration**
The Development Team will operate until the conclusion of the strategy development that has been approved by Council.

9. **Budget and Resource**
A budget will be developed and form part of the final report that is presented to Council for approval.

10. **Confidentiality and Conduct**
Team members will maintain confidentiality when necessary. Conflicts of interest must be disclosed at the commencement of each meeting where applicable.

11. **Review and Amendment**
The Terms of Reference may be reviewed when deemed necessary by CAO and team.

12. **Dissolution of Committee**
The Team may be adjourned upon the conclusion of the implementation of the strategy with the ability to reconvene for project monitoring purposes.