Contact Centre Transformation Roadmap

Executive Report
Nov 28th, 2019

Service Excellence for our Communities

Table of Contents

Executive Highlights

- Today, the Region of Durham (RoD) has 28 identified Contact Centres (CC) in 9 departments across the region. These CCs handle customer interactions through a number of different channels including phone calls (over 700k), emails, and walk-ins

- A majority of these CCs are operating in silos with over 60 phone numbers for citizens to navigate, causing confusion and multiple handoffs

- Furthermore, most CCs operate with a blended employee model where staff handle calls as well as off- phone tasks. Although there are some departments who have implemented a multi-tiered model based on complexity of request, the small queue sizes within these siloed multi-tiered contact centres render them operationally inefficient.

- RoD leadership recognizes the value of an integrated contact centre to create a more consistent and seamless citizen experience and has asked for a tactical roadmap of activities to underpin its contact centre transformation

1. **Areas of Excellence:** There are many areas where the RoD is excelling in delivering outstanding contact centre citizen experiences, including willingness to go above and beyond to help citizens and colleagues, keeping response time in mind, and utilizing instances of innovative technology platforms

2. **Inconsistent citizen data across RoD**: There is no standard view of citizen data / interactions across departments (i.e. there exist many cases where citizens are re-directed and their issues are either re-explained by the person transferring or themselves)

3. **Centres invest resources in non-specialized services**: Departments perform both general and specialized/case mgt. services, however many perform services not typically executed by a CC (e.g. Payments), creating inefficiencies & vulnerability to service level variations

4. **Technology is not consistent / optimized across RoD**: The siloed nature of RoD CCs has resulted in multiple telephony platforms & phone numbers, and multiple technologies that serve the same purpose. Moreover, many CCs utilize different versions, incl. end-of-life versions, of the same application (e.g. Lagan). Some leading technologies exist (e.g. CC&B, REMS), however a majority are not leveraged across RoD effectively

5. **Environment does not fully enable staff**: Lack of a formalized knowledge base is causing outdated / inconsistent information across depts. Furthermore, varying maturities of training processes is resulting in potential skills gaps, extended training times, & inconsistent service delivery

6. **Lack of data-driven management**: Manual / non-existent data tracking (e.g. call and volume mix) and lack of formalized Key Performance Indicators (KPIs) across CCs hinders RoD's ability to measure how effectively it is meeting customer service objectives

Recommendation

We recommend simplifying RoD's phone number strategy and adopting a formalized multi-tiered contact centre operating model that consolidates agreed upon call types into a single enterprise contact centre supported with the necessary technology enablers. These recommendations support transforming the customer experience, enabling RoD contact centre employees, and leveraging data insights. A supporting roadmap outlines the initiatives to implement the recommendations

Approach & Observations

Service Excellence for our Communities

Durham Region would like to transform its citizen experience by creating a transformation roadmap for its contact centres

Background & Context

- RoD has embarked on its journey to transform its Contact Centre services and enhance citizen experience
- Long-term vision is to integrate with 3-1-1 services and this engagement is focussed on getting the foundation built to enable the integration
- Key challenges the organization is looking to address through its transformation journey:

Distributed communication channels

No single view of the customer

Lack of Integration across channels

Legacy Technology & Infrastructure

Operational Inefficiencies

Differing citizen experience

Engagement Objectives

- Regional Municipality of Durham would like to have a detailed understanding of all key activities required as a part of this transformation. These activities include:

A Contact Centre Future State Vision & Guiding Principles

B Transformation roadmap with milestones, key initiatives & decisions highlighted

C High Level Implementation Costs & Directional Savings Estimate

D Recommend technology platforms & tailor lessons learned / highlight potential pitfalls

Our Approach

i **Perform Activities to Understand Contact Centre Current State**

ii **Develop & Refine Tiered Contact Centre Model**
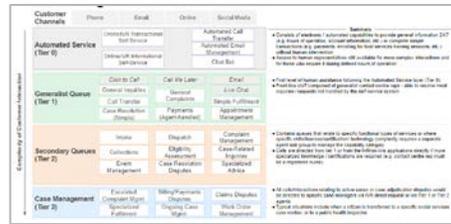
v **Create Transformation Roadmap + Identify Quick Wins**
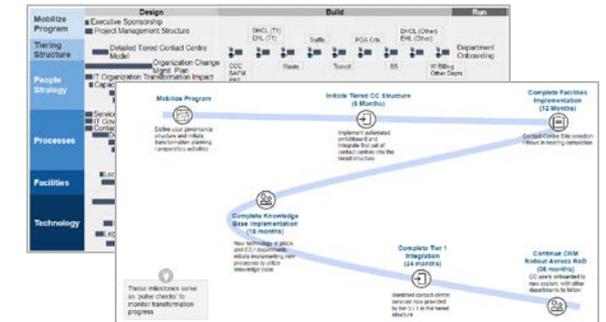
iii **Validate & Prioritize Roadmap Initiatives**
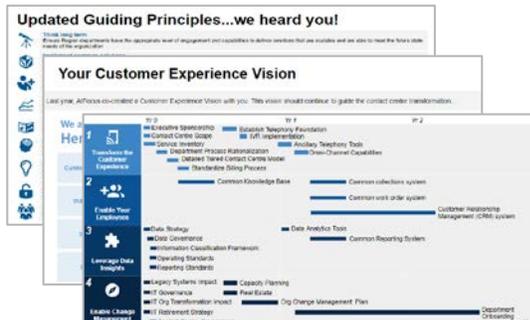
iv **Identify Technology Options + High-Level Optimization Opportunities**
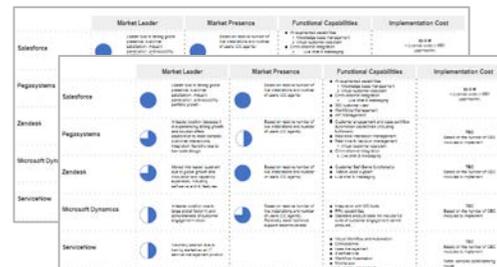
We secured perspectives of over fifty stakeholders from 28 different contact centres across nine different departments

How we engaged you

Side-by-side observations and call listenings with agents

Interviews to understand the organizational current state, with representation across multiple departments/contact centres

Analysis of processes, documentation, and data to understand current ways of working and performance tracking

20+
1-1 Interviews

14+
Hours of side by side listening

60+
Documents reviewed

50+
Stakeholders engaged

2
Co-creation Workshops

We observed many areas where the RoD is excelling in delivering outstanding contact centre citizen experiences

You're willing to help your colleagues

You go above and beyond to help citizens

Innovative technology platforms in certain areas

You have built the foundation to deliver excellent customer service

You keep response time in mind when answering customers

You love your jobs and helping the citizens of Durham

You're knowledgeable and professional in your interactions

We've identified several challenges

Inconsistent citizen data across RoD

- No consistent view of citizen data across RoD departments
- No 360 view of citizen interactions across departments (i.e. there exist many cases where citizens are re-directed and their issues are either re-explained by the person transferring or themselves)

Centres invest resources in non-specialized services

- Depts. perform both general and specialized / case mgt. services
- Depts. perform activities that are typically not performed by contact centres; for example:
  - Distribution of materials (e.g. lab samples, tickets)
  - Operating Lost and Found
- Large number of small CCs perform similar activities

Technology is not consistent / optimized across RoD

- Multiple phone numbers (60+)
- Not all CCs across RoD use a common telephony platform
- Telephony tools (e.g. IVR, Chat bots) not effectively deployed
- Depts. appear to utilize different versions of some applications (e.g. Lagan), some of which are older versions / end-of-life
- Available leading tech (e.g CC&B, REMS, OW app), not leveraged across RoD
- Nascent self-service capabilities

Environment does not fully enable staff

- No formalized shared knowledge base (KB) for staff training / processes
- Majority of siloed CC training materials require manual updates
- Some depts. do not have a defined training process
- Physical environment is not amenable to a CC env.

Lack of data-driven management

- Technology does not enable consistent / insightful data analysis across the RoD
- Data tracking & reporting (e.g. call and volume mix) is often done manually, if at all
- There are no formalized Key Performance Indicators (KPIs) across contact centres to drive customer service standards

Impact

- Inconsistent citizen experience
- Increased call volumes and overall handling times

- Queueing inefficiency due to small size of CCs
- Increased vulnerability to service level variations

- Cumbersome and confusing citizen experience
- Multiple handoffs
- Missed opportunity to leverage scale through app rationalization

---

- Outdated KB
- Inefficient staff onboarding incl. extended training times
- Potential staff skill gaps
- Inconsistent service delivery

- Potential for inefficient resource load planning
- Inability to identify service delivery improvement opportunities

Resolving these challenges was a priority in the development of the Contact Centre Transformation Roadmap

The Contact Centre Transformation Roadmap was developed keeping RoD's customer experience vision of *'We are Here For You'* in mind

This vision translated as follows for the Contact Centres...

Customer Centric Design

Service delivery will be developed from a customer point-of-view incorporating what's important to them

Individualized

Customers will be able to access service how they want and when they want. They will be able to customize communication and services to their own needs

Integrated

Customers will be able to access multiple services at various locations from various levels of government

Seamless

Customers will only have to tell their story once. We will get you to the right person if at first we cannot help you completely

We utilized the customer experience vision that was co-created with employees and delivered as part of the customer experience project

Co-created guiding principles underpinned roadmap initiative selection

Think long term
Ensure Region departments have the appropriate level of engagement and capabilities to deliver solutions that are scalable and are able to meet the future state needs of the organization

Implement common solutions
Leverage common solutions where there are common needs across departments, while having the flexibility to adapt to innovation specific business requirements

Enable citizens
Design and deliver solutions that will help enable citizens to seamlessly access services how and when they want

Focus on initiative timelines and impact
On a case-by-case basis, prioritize initiatives that deliver immediate impact and will serve the greatest number of people across the organization, thereby enabling Durham to better allocate resources to serving citizens

Promote data as an asset
Promote the responsible access, sharing, and management of information across the organization to move towards more data-driven decision making

Maintain a privacy and security mindset
Incorporate privacy, collection, and retention controls into the design of solutions to handle "need-to-know" data, while still enabling more data-driven decision making

Innovation mindset
Embrace innovation, emerging technologies, and new ways of working while balancing risk and external factors such as regulations / legislation

Accommodation and accessibility
On a case-by-case basis, evaluate how initiatives may impede citizen access to the Region's services

Empower Staff
Leverage tools and processes to free up your time so that you can continue to focus on activities that add value to citizens' lives

Note that RoD operates under many legislation including but not limited to MFIPPA and PHIPA, including the Health Protection Act and Immunization of School Pupils Act.

Recommendations & Roadmap

Service Excellence for our Communities

Recommendations

We recommend simplifying RoD's phone number strategy and adopting a formalized multi-tiered contact centre operating model that consolidates agreed upon call types into a single enterprise contact centre supported with the necessary technology enablers

Transform the Customer Experience	**Enable Your Employees**	**Leverage Data Insights**	**Support Change Management**
Re-imagine how RoD delivers services to its citizens by transforming its delivery structure from a disparate multi-phone number structure to a more integrated omni-channel experience leveraging CC tools to advance how it engages with citizens	Empower RoD employees with the right tools, knowledge, and working environment to perform their jobs effectively and promote collaboration anytime, anywhere	Aggregate and record data from multiple citizen channels into a single location accessible by all departments, while adhering to the individual privacy and regulatory requirements to create a seamless customer experience	Develop and create additional tools, processes, and techniques to guide and better prepare your employees through the contact centre transformation and into the new operating model
Allow RoD citizens to access services how and when they want	*Equip RoD employees with the right tools & knowledge to better serve citizens*	*Initiate fact-based continuous improvement initiatives to help RoD meet and exceed its goals*	*Create an efficient experience for RoD citizens & employees through this transformation*

Recommendations are grouped in tactical workstreams for execution

Recommendations

Transform the Customer Experience	**Enable Your Employees**	**Leverage Data Insights**	**Support Change Management**

Initiatives

- CC Integration Plan
- Service Inventory
- Department Process Rationalization
- Telephony Core CC
- IVR Implementation
- Omni-channel Capabilities

Initiatives

- Facilities Review & Selection
- Co-locate CC Agents
- Knowledge Base
- CRM System

Initiatives

- Define Standards
- Department Process Rationalization
- Data Governance
- Data Analytics Tools

Initiatives

- Detailed Business Case
- Executive Sponsorship
- Program Governance
- Project Management Structure
- Detailed Tiered Contact Centre Model

The recommendations above are supported by initiatives categorized in the following 6 tactical workstreams

Mobilize Roadmap	**Tiering Model**	**People Strategy**	**Processes**	**Facilities**	**Technology**
Establish the leadership, governance, and project delivery foundation to enable roadmap implementation	Establish the tiered contact centre model and incorporate department CCs while considering privacy and legislation	Evaluate and address staff impacts of the Transformation. Plan and implement resource strategy	Optimize processes for the future state and define operating standards	Evaluate, select, and provision facilities to house contact centre staff	Implement technologies and strategies to support the contact centre tiered model

A key component of Transform the Customer Experience is the implementation of a multi-tiered contact centre model

A multi-tiered model is a foundational component of enabling the customer experience transformation because simplifies access to services for citizens while maximizing operational efficiencies and supporting more effective deployment of staff skills

Transform the Customer Experience

Re-imagine how RoD delivers services to its citizens by transforming its delivery structure from a disparate multi-phone number structure to a more integrated omni-channel experience leveraging CC tools to advance how it engages with citizens

Allow RoD citizens to access services how and when they want

Tiered Contact Centre Model

Automated Service (Tier 0)
Generalist Queue (Tier 1)
Secondary Queues (Tier 2)
Case Management (Tier 3)

Complexity of Customer Interaction

Each tier houses capabilities/services which increase in complexity or skill requirements as the tiers increase, with Tier 0 housing automated services and Tier 3 housing more complex, customer case management services.

Detailed Tier Summaries

Tier Summary

Complexity of Customer Interaction

Automated Service (Tier 0)
- Consists of electronic / automated capabilities to provide general information 24/7 (e.g. hours of operation, account information, etc.) or complete simple transactions (e.g. payments, enrolling for food services training sessions, etc.) without human intervention
- Access to human representatives still available for more complex interactions and for those who require it during hours of operation

Generalist Queue (Tier 1)
- First level of human assistance following the Automated Service tier (Tier 0)
- Front-line staff composed of generalist contact centre reps - able to resolve most inquiries / requests not handled by the self-service system

Secondary Queues (Tier 2)
- Contains queues that relate to specific functional types of services or where specific skills/licenses/certification/ technology complexity requires a separate agent skill group to manage the capability category
- Call types themselves are not always more complex
- Calls are directed from Tier 1 or from the IVR/on-line applications directly if more specialized knowledge / certifications are required (e.g. contact centre rep must be a registered nurse)

Case Management (Tier 3)
- All calls/interactions relating to active cases or case adjudication disputes would be directed to specific case managers via IVR direct request or via Tier 1 or Tier 2 agents
- Typical situations include when a citizen is transferred to a specific social services case worker, or to a public health inspector

Prior to migration to a multi-tiering CC model, each CC's specific capabilities need to be mapped to relevant tiers

Customer Channels | Phone | Email | Online | Social Media | Click to Call | Call Me Later | Live Chat

Complexity of Customer Interaction

Automated Service (Tier 0)
- Online/IVR Informational Self-Service
- Online/IVR Transactional Self-Service
- Automated Call Transfer
- Automated Email Management
- Chat Bot

Generalist Queue (Tier 1)
- General Inquiries
- Call Transfer
- Case Resolution (Simple)
- General Complaints
- Payments (Agent-handled)
- Appointment Management
- Simple Fulfillment

Secondary Queues (Tier 2)
- Intake
- Dispatch
- Complaint Management
- Collections
- Eligibility Assessment
- Case-Related Inquiries
- Event Management
- Case Resolution Disputes
- Specialized Advice

Case Management (Tier 3)
- Escalated Complaint Mgmt.
- Specialized Fulfilment
- Billing/Payments Disputes
- Ongoing Case Mgmt.
- Claims Disputes
- Work Order Management

This multi-tiered contact centre model will consolidate agreed upon call types from all departments into a single enterprise contact centre, in preparation to move to 311 for the entire region. At all times, citizen privacy / legislation will be considered when reviewing call types for consolidation

Target milestones of the Contact Centre Transformation Roadmap

CC Transformation Planning / Preparatory Activities (1 Month)

CC organization alignment and establishment of the governance model for the centralized CC

Interactive Voice Recognition (IVR) & Repoint Phone Numbers (5 Months)

IVR design and implementation complete - repoint identified phone numbers as part of IVR

Migrate First Wave of CC Services (7 Months)

Implement automated switchboard and integration of first set of contact centres into the tiered model now complete

New CC Facility (9 Months)

CC site selection / preparatory activities complete - CC agents can now be moved in

Phone Number Rationalization (18 months)

CC phone number rationalization complete - marketing materials / website should now show "1800-Durham" as main contact point

Complete CC Transition (23 months)

Integration of identified CCs now all integrated into tiered model

CRM Rollout Across RoD (24 months)

All CC users onboarded to new system (general inquiries / case mgt.), with other capabilities to follow

Continuous Improvement (e.g. Data Analytics) (24+ months)

Additional capabilities implemented to improve data driven capabilities

These milestones serve as 'pulse checks' to monitor transformation progress

18

Expected Benefits

Service Excellence for our Communities

Identified roadmap initiatives will enable both qualitative and quantitative benefits

Qualitative

Improved Citizen Experience	Better Access to Services	Consistent Citizen Experience & Reduced Data Entry Efforts	Talent Progression Opportunities
Through reduced *wait times & transfers* by implementing Key Performance Indicators and a tiered CC model	Through 24/7 access to a greater set of *self-service* options	Through creation of a *single view* of the customer	By *broadening agent roles* and creating promotional opportunities through a tiered queuing model

Quantitative

~ 3500 Hours/Yr	> 23%*	50 - 75%	3 - 7%**
Capacity increase for *reinvestment* into *higher value tasks* within CCC & Income Support Svcs. based on current utilization	Of all RoD calls *automated* based on switchboard call types in Corporate Contact Centre & Income Support Services	Automation of 50 - 75% of *in-person payments* by implementing online/ phone payments	Incremental *queueing* efficiency gain through creation of larger call centre queues**

Identified benefits are directional due to data availability

* Full estimation of capacity created across all departments not possible due to lack of data tracking

** Based on industry experience

Next Steps

Next Steps

Prerequisite Activities

❑ Sign off on Contact Centre Transformation Roadmap
❑ Develop detailed business case for Roadmap implementation
❑ Initiate purchasing processes for identified technologies (e.g. CRM, Knowledge Management, IVR, etc)
❑ For each contact centre integration wave, determine call types to be migrated

Mobilize Transformation Program

❑ Appoint executive sponsor and project sponsor for the Contact Centre Transformation
❑ Establish a dedicated project delivery team
❑ Develop and sign off of project plan
❑ Establish a Steering Committee (e.g. Department Heads) to direct and oversee the Transformation
❑ Develop a terms of reference for committees to define their objectives, responsibilities, and ways of working

Continue Technology Activities

❑ Continue to IP-enable contact centres across Region of Durham and migrate onto a common telephony platform
❑ Design and implement IVR to automate switchboard calls, allowing first set of identified contact centres to move services / resources to new tiered CC model
❑ Repoint existing phone numbers by wave and begin phone number rationalization planning

Initiate People and Process Activities

❑ Determine department contact centre current state capacity and utilization
❑ Continue validation of service catalogues with department contact centres and IT; explore process standardization
❑ Begin executing people strategy initiatives such as creating a required skills inventory, job descriptions, and assessing feasibility of a union rationalization

Initiate Facilities Activities

❑ Based on high level staffing requirements, identify potential locations to house general queue