Current Customer Experience Practices & Key Challenges

<u>Building Services Department - Customer Experience Practices</u>

Customer Service Response Standard

The Building Department aims to respond to inquiries within 24–48 hours, prioritizing same-day responses whenever possible. This standard applies across email, phone, and in-person inquiries, though complex issues may take longer to resolve.

The Building Department engages with customers through multiple channels to ensure accessibility and responsiveness:

Online Services:

- Since, 2021, applicants can apply for permits, pay fees, track application status, and schedule inspections via the Citizen Portal.
- Approximately 90% of applications are submitted online.
- Continuous efforts are underway to enhance the digital experience for applicants.

In-Person Support:

- Operates five days a week with a consistent in-office presence.
- Zoning Examiner on Duty handles approximately 5,200 inquiries annually, serving as the first point of contact for zoning-related inquiries.
- Building Services Representative (BSR) Rotation System ensures in-person attendance at Town Hall allowing for prompt responses to phone calls, emails, and walk-in inquiries.
- Quarterly meetings with Development industry stakeholders
- Technology training for customers

Email Support:

- Primary channel for communication via dedicated email accounts:
    - Building Requests: General permit and inspection inquiries.
    - Building Inspection Requests**:** For scheduling and inspection updates.
- Regular email newsletters provide updates and guidance on various topics.
- Daily email volume (based on emails received):
    - 20–30 emails during normal activity.
    - 40–50 emails during peak periods.

Phone Support:

- Phone support is provided both by ServiceOakville and Building Services staff.

- Building Services staff shared phone lines ensure coverage, with voicemails checked and returned daily.
- Most Zoning-related inquiries are responded to within 24 hours. Staff often receive compliments regarding this service.

Inquiry Tracking:

- Inquiries related to illegal construction and permit/inspection requests are logged in AMANDA, a system for tracking building complaints. However, general inquiries are not consistently tracked, some go through Service Oakville while other directly to the building services mailbox.
- Complex inquires received via email involving multiple departments can take several days to get to the correct department/person.
- Some inquiries are captured in the town CRM system by Service Oakville
- Email trails serve as informal records, but a comprehensive tracking system is not in place.

Efforts are being made to strengthen support across all channels. For in-person services, the focus is on increasing accessibility and collaboration for both Building and Development Engineering teams. This includes creating a new collaborative space and implementing systems to optimize the customer experience and improve service efficiency.

Planning & Development Department Customer Experience Practices

Customer Service Response Standard

Response times for general inquiries are within 24 hours with many inquiries receiving same-day service. Complex or application-related matters may require additional time to thoroughly research and address the question and may require input from other town departments and public agencies.

Online Services:

Since 2022, applicants can apply for three types of planning applications online: part lot control, fence variance, and holding by-law removal.
- Development engineering permits and inspections can also be submitted and booked online.
- The frequency of legislative changes in the past four years has forced staff and the town to constantly change and adapt processes to respond and ensure legislative compliance.
- Town staff host fully virtual pre-consultation and technical meetings with applicants on a weekly basis. The transition to virtual occurred in April 2020 and has proven popular for applicants due to the set schedule and efficiency for both applicants and their consultants due to enhanced cost and time-savings.

In-Person Support:
- Planning staff have a rotating "Planner on Duty" daily schedule which allows staff to respond to, and manage, inquiries, ensuring that a dedicated team member is always available.
- Appointments are strongly encouraged for the public seeking detailed discussions. This ensures that all necessary personnel are available for in-person meetings, replacing the ad hoc "drop-in" practice which was inefficient for customers. Instead, staff are available to manage inquiries through the appropriate workflow.
- Developers and applicants familiar with the process rarely utilize ServiceOakville and instead liaise directly with staff since the staff members are the "point person" who manages the application workflow and sets in-person meetings.

Email Support:
- Handles two primary types of inquiries:
  Developers/applicants/residents requesting updates on active applications.
  Residents seeking information on zoning or land-use planning permissions.

- Response standards:
  General inquiries: Staff respond within 24 hours and where additional time is required to fully address issues; inquirers will be advised on timing.
  Application-specific inquiries: Varies depending on complexity. Appointments are strongly encouraged for developers seeking detailed discussions.

Phone Support:

- Managed by ServiceOakville, Planning & Development staff, and the Planner on Duty (responsible for same-day or 24-hour responses).
- Some inquiries are also managed by Planning and Engineering Clerks.
- Development Engineering Review Team:
  o Responds within 48 hours, even if detailed answers are unavailable immediately.
- Most applicants and developers are familiar with town staff and therefore by-pass ServiceOakville to communicate with staff directly.

Inquiry Tracking:

- Development engineering inquiries are primarily tracked through the CRM system, initially managed by Service Oakville. Staff report misrouting of inquiries as an issue that will be improved through process enhancements.

Inquiries related to planning applications are not formally tracked, with some planners using Excel spreadsheets or AMANDA for recording relevant actions.

Key Challenges

1. **Legislative Changes and Process Complexity**
   - **Frequent legislative changes and the inherent complexity** of the development approval process pose significant challenges for both staff and customers. Delays in updating digital services and website information exacerbate customer confusion and dissatisfaction with service delivery.
   - Additionally, the recent **downloading of responsibilities from Regional and Conservation Halton authorities** to local municipalities has increased workloads, delays, and confusion regarding jurisdiction. The same staff are now expected to take on these additional responsibilities, with limited training to adapt to the new responsibilities and processes, further straining resources and capacity.

2. **Inconsistent Inquiry/Issue Tracking**
   - Building and Planning & Development inquiries lack uniform tracking with only application-based inquiries formally logged.
   - General inquiries are occasionally lost in emails, making it difficult to fully assess service demands and staffing needs.

3. **Response Delays**
   - **Inquiries are occasionally misrouted** due to the absence of a clearly documented approval system, causing delays as they are redirected to the wrong departments. This realization has allowed us to begin creating an approvals wizard (AI or chatbot).
   - **Balancing Communication and Processing Efforts**: Staff efforts to respond to inquiries while maintaining their obligations to their active applications, creates a challenging balance between timely communication and operational efficiency.
   - **High Volume of Redundant Communication:** The practice of sending multiple emails about the same issue to various departments increases inefficiencies and delays. The "copy everyone approach," can lead to duplicate efforts, with multiple staff responding to the same inquiry, or, conversely, no response at all due to assumptions that someone else will reply.

- o **Complexity of Issues:** Some inquiries or applications are inherently complex, and demand extended review periods to ensure thorough evaluation and compliance. While this additional time is essential, customers may perceive it as a delay, contributing to frustration and dissatisfaction with the process.
- o **Service Standard Goal:** Staff intend to respond within 24 hours but may take up to 48 hours**.**

4. **Owner and Applicant Communication**
   - o **Owners are not always aware of their application status** due to miscommunication with their agent or contractor.
   - o **New technology improvements** will provide direct updates to owners, eliminating this gap.