



<b>CORPORATE POLICY</b>		<b>CP.1.1.3.</b>
<b>Section</b>	<b>1</b>	<b>Administration</b>
<b>Subsection</b>	<b>1</b>	<b>General</b>
<b>Title/Subject/Chapter</b>	<b>3</b>	<b>Customer Service Response Policy &amp; Standards</b>
<b>Approval Authority:</b> CR-202-08.11	<b>Effective Date:</b> September 08, 2011	

### **1. PURPOSE:**

The purpose of this policy is to set out clearly defined standards for responding to customer/stakeholder inquiries and complaints regardless of the means those inquiries are received. (in-person contact, telephone, written or by way of e-mail correspondence).

The Town of Innisfil supports sound governance and accountability through a focus on service excellence and is committed to friendly, courteous, timely, accurate and complete responses to customer/stakeholder inquiries, complaints and issues.

### **2. VISION:**

Building a strong community requires a unified, connected and cohesive approach that engages customers and all stakeholders in collaborative, professional and ongoing communication.

Achieving excellence in customer service is recognized as a key priority of the Corporation and embraces the need for transparency and accountability. Ensuring that staff are trained, skilled and sufficient staff resources are available to achieve the desired results is critical to the delivery of excellent customer service.

### **3. APPLICATION**

The policy applies to all Town of Innisfil staff, Council and Committee Members receiving inquiries, issues and complaints from external customers.

### **4. CENTRALIZED CUSTOMER SERVICE STANDARDS:**

All issues involving inquiries or complaints concerning any Town employee will be forwarded directly to the Human Resources Department for appropriate action and follow-up. A case will not be created in the Town Property System (TPS) tracking software and no further action or follow-up will be taken by the Customer Service Representative (CSR) as the matter will reside with the Human Resources Department for tracking and follow-up. Where the complaint is in relation to a member of the Human Resources Department the complaint will be directed to the Chief Administrative Officer for purpose of appropriate action and follow-up.

All external inquiries or complaints are to be received by or directed to Customer Services via e-mail, regular mail, telephone or in-person at Town Hall. This includes any external inquiries or complaints sent to or received directly by members of Council or staff.

## 5. RESPONSE TIME FRAMES:

(Subject to staffing resources)

Within **two** business days of receipt a departmental service area staff member will:

- provide a response or resolution to the appropriate CSR who will then contact the resident or;
- provide acknowledgement of receipt of the inquiry or complaint by e-mail in TPS sent to the CSR, which may include a manager designating a staff member to investigate further, if required.

Within **five** business days the departmental service area will:

- provide a full and final resolution to the CSR for reporting to the customer or, if a response was provided directly, provide details concerning the issue resolution such that the case can be closed or;
- send an e-mail to the CSR through TPS providing information concerning the action that is being undertaken with an approximate **time frame** for resolution.

Within the **time frame** identified for investigation the departmental service area will:

- undertake the required work to review the issues/complaints such that a proper resolution can be achieved or satisfactory response provided and;
- update the CSR, as appropriate, with the resolution or response, or provide a revised time for completion when the original time provided was determined inadequate to properly resolve and;
- continue to update, as required, until the issue is fully and finally resolved.

## 6. ESCALATION PROCESS

To ensure a high level of customer service and satisfaction is achieved it may be deemed expedient, and necessary at times to immediately escalate issues to a Manager, Director or the Chief Administrative Officer (CAO). If the CSR and the Supervisor of Customer Service determines that an item is extremely urgent and cannot wait to be handled through the normal tracking process, it will immediately be escalated to the appropriate Manager, Director or the CAO. The CSR and Supervisor of Customer Service will use discretion to ensure that routine issues

are not inappropriately escalated. The item will still be logged into TPS and subsequently tracked in accordance with this Policy.

## **7. REPORTING AND PERFORMANCE MONITORING**

Monthly summarized reports will be provided the first week of each month to ensure that the CAO, Directors and Managers are aware of issues in their respective areas, and to provide administration with an opportunity to follow-up with staff.

## **8. CORPORATE COMMUNICATIONS STANDARDS**

### **8.1 Telephone Services**

**Staff are required to properly identify themselves and their service area when answering telephone calls to ensure that the caller is aware of who they are speaking to and whether they have reached the appropriate service area.**

- An example of an appropriate greeting would be: "Thank-you for calling Planning Services, my name is Jane, how may I help you?"

**Callers shall have the option of a live response (subject to staffing resources) during core business hours (8:30 a.m. to 4:30 p.m. Monday to Friday)**

- Staff voice mail greetings should state their service area and their first name and must provide the caller with the option of leaving a message or speaking with another person in their work area. The employee's name and extension number should be part of the greeting. Staff should also avoid having each other named as alternate contacts in order to avoid "voice mail circles"

**All voice mail box greetings are to be updated when an employee is out of the office for extended periods of time (1/2 day).**

- If an employee expects to be out of the office (or away from their desk) for one or more business days, his/her voice mail greeting should be brief, must reflect that he/she is out of the office, identify who to contact in his/her absence and advise the caller of the anticipated return date.

**Telephones should be forwarded to voice mail when away from the workstation, including during non business hours.**

- By forwarding telephones to voice mail the caller will be able to leave a message or redirect their call without having to wait for the rings to be completed.

**All calls should be returned within two (2) business day with, including as a minimum an acknowledgement of the call.**

- All staff should strive to meet this level of service. Timeliness is the greatest contributor to overall customer satisfaction and that which has the most room for improvement.
- If getting a complete answer will take several days – provide the customer the courtesy of a phone call to let them know that.

## 8.2 E-Mail & Written Correspondence Services

**All e-mail & written correspondence is to be responded to within three (3) business days.** (except when away from the office for vacation/training or otherwise)

- The target we are attempting to achieve is full resolution within five (5) business days. If this is not able to be completed the customer should be notified that their request has been received, and be provided with an outline of when they may expect a more detailed response or action. If a shorter timeframe for response is required by law or for other reasons, staff should meet that shorter timeframe.

**If an employee expects to be out of the office for half a business day or more, the e-mail out of office assistant should be used to set-up automatic notification messages for internal and external e-mails. The structure of the message will be supplied and approved by the Management Team and Communications Services.**

## 8.3 In Person Services

Staff should greet customers in a professional manner regardless of the location or venue where the contact is being made. Town issued identification must be worn and visible at all times to ensure the customer they are dealing with an employee of the municipality.

Courtesy and respect should be shown even if the customer is upset. If you are interacting with a customer and you are also required to answer a phone or mobile device explain to the customer you are required to answer. However, you should give the calling customer the option of holding or having you call them back after you have completed with the current customer.

Staff should do what is necessary to help the customer even if it is not their area of responsibility or if they have no personal knowledge of the subject matter. This may involve taking down pertinent details concerning the issue and relevant contact information and advising the customer that these will be provided to the Centralized Customer Services area for proper logging and follow-up to take place. It is not acceptable to say “That’s not my department” or “I can’t help you with that.”

## 8.4 Web Based Services

The Town website contains valuable information concerning services, forms, Council agendas and minutes, by-laws, user fees and charges, tax information, the ability to file complaints and BizPal – a one-stop shop for businesses requiring permits from all three levels of government. Staff should make customers aware of the website at [www.innisfil.ca](http://www.innisfil.ca) and the features that are available for keeping current on news and events as well as the access to other information and services.

## 9. RESPONSIBILITIES

Employees are responsible to:

- Adhere to the standards set out in this policy
- Participate and engage in training opportunities that support the Customer Service Standards policy
- Discuss any difficulties or barriers encountered in meeting the objectives of this policy with their supervisor.

The Management Team and Communications Services are responsible to:

- Ensure staff are aware of the corporate policy regarding the Customer Service Standards
- Provide necessary training and coaching to help staff understand and meet the standards
- Continue to monitor the standards through the performance evaluation process

Council and Committee members are responsible to:

- Forward all inquiries and complaints to Customer Service for recording in TPS and subsequent tracking and follow-up until resolved.

## 10. REVISION HISTORY

Revision Number	Date	Summary of Changes	Approval Authority
1	July 09, 2014		CR-112-21.14