



City of Kawartha Lakes

Customer Service Standards

**Providing Exceptional
Customer Service**

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Principles of Customer Service Standards

The City of Kawartha Lakes Corporate Strategic Plan identifies “Municipal Service Excellence” as one of the four strategic enablers to provide responsible, efficient and effective services.

The City of Kawartha Lakes is committed to providing a high standard of service to all customers. Customers include staff, residents, business owners, visitors, tourists, investors and other stakeholders.

The standards outlined in this document are a reflection of “Municipal Service Excellence” and the City’s commitment to:

- ✓ Provide exceptional customer service
- ✓ Enhance communications with customers and staff
- ✓ Reduce calls and inquiries from being “bounced around” internally
- ✓ Provide service excellence at all levels within the City and focus on the key drivers of customer satisfaction to:
 - Respond and acknowledge receipt of customer contact within a reasonable time frame
 - Provide accurate information and/or the avenue for the customer to receive it
 - Provide fair and consistent treatment
 - Be polite and respectful
 - Provide a response and ensure completeness of service or request
- ✓ Align with the Corporate values:
 - Collaboration – service excellence is possible by working together
 - Continuous Improvement – continual improvement through planning, evaluating and reporting
 - Excellence – striving for excellence to meet our commitment to customer service
 - Innovation – open to new ways of improving and leveraging technology
 - Results – focusing on achieving positive results

These guidelines set minimum standards to communicate with customers efficiently and respectfully.

Channels of Communication

The customer service standards provide guidelines for quality delivery of services through the following customer communication channels:

- Telephone
- Email / Correspondence
- In Person

Telephone

Telephone Response Time

Customer calls are returned as soon as possible when they are received. As a general rule, telephone calls will be returned within two (2) business days.

Staff's response, within two business days, may not provide a complete resolution, but will be an acknowledgement that the message has been received. Staff should also provide an indication of any further action that will be taken to resolve the issue. The Polycom phone manual is available at [Polycom Phone Instructions](#).

Receiving Calls

When answering an external phone call, a consistent greeting should be used, always including a greeting and first name, and as appropriate, an applicable office and/or an offer of assistance.

ie "Good afternoon, Mayor's office, Mary speaking. How may I help you?"

ie "Good morning, Planning Department, Mary speaking."

When answering an internal call, a greeting and first name is sufficient.

ie "Good afternoon, Mary speaking."

At the end of a call, staff members are encouraged to include three elements: summarize, set expectations and a thank you.

ie "To summarize, once you submit the completed permit, we will review it and provide feedback within 10 days. Thanks for calling and if you have any further questions, please contact me at extension 1234."

Placing a Customer on Hold

If you need to place a customer on hold, ask permission to ensure they have time to wait. If they are not able to wait, provide an alternate solution on how you will contact them.

After placing the customer on hold, check back periodically. Thank them for holding.

Transferring a Call

There are two types of transfers: warm transfer and cold transfer.

Warm Transfer

A warm transfer is used when the caller and staff both stay on the line until a connection is made. The caller is on hold while staff relays information to the third party. Warm transfers reduce the chances of the customer being “bounced around” by ensuring that the proper transfer is made the first time. If the transfer isn’t the correct one, calls should be re-directed appropriately. Staff may also appreciate a “heads up” as to the issue; the customer will appreciate being transferred to the correct staff person.

ie “Hi Jim. I have Jane Smith on the phone and she requires information about her taxes. She has not received a tax bill this year. Could you assist Jane with her concern?”

Warm transfer instructions are available at [Polycom Phone Instructions](#) under consultation transfers.

Cold Transfer

A cold transfer is used when a caller is transferred directly. This process may be used with external or internal callers who specifically request a person by name, extension or department but offers no other information. Use caution to ensure that you have transferred the customer correctly.

Cold transfer instructions are available at [Polycom Phone Instructions](#) under blind transfers.

Sample Voice Message Responses:

Refer to Appendix A for voice message samples:

- In Office
- Out of Office
- Specific Working Hours
- Part Time Staff
- Spare Phones
- General Mailbox Line

Corporate Cell Phones

Corporate cell phones users will follow the same general telephone guidelines as established for internal corporate phones.

Absences

Voice messages are the responsibility of staff. If you are out of the office for more than a day and unable to update your voice message, inform your Manager that it needs to be changed.

Staff are not expected to change voice messages while they are away for brief periods during the day (ie away for a 2 hour meeting). If you are out of the office for an extended period, voicemail should reflect the vacancy.

If an employee is off sick, the Manager is responsible to determine the best option to address calls that are on voice message during absences (ie call forward the calls, change voicemail message, etc.)

Leaving a Voicemail Message on a Customer's Phone

When you leave a voice message for a customer, it is important to leave a call back number **and extension** (705-324-9411, **ext 9999**); most callers have call display and often call the Call Centre asking who called from the City of Kawartha Lakes. Leaving details for the customer will eliminate confusion on who to contact in the City.

Guidelines:

- Speak slowly and clearly, and keep the message as brief as possible
- Leave your name, position/division
- Indicate that you are calling from the City of Kawartha Lakes and leave a phone number AND phone extension
- Indicate the reason for your call
- Indicate the time and date of your call

Receiving Calls Outside the Standard Administration Hours

If you are working outside the standard administration hours (8:30 a.m. to 4:30 p.m.), and you receive a call from the public when the offices are closed, provide the caller with the City's standard hours (8:30 a.m. to 4:30 p.m.) and the 705-324-9411 general number.

If the call is a **Municipal** emergency, which cannot wait until the next business day, provide the caller with the after-hours emergency number 1-877-885-7337.

If the call is an emergency for Fire, Police or Ambulance, provide the 911 number.

Received a Call and Not Sure Where to Direct It?

A City telephone directory is available on the employee website (under the My City tab) to assist staff in locating the appropriate contact within the City.

Customer Service Representatives at the Call Centre can also help to re-direct customers to the appropriate department during business hours.

To reach the Call Centre, dial 3608 to speak with a Customer Service Representative. Always use a “warm transfer” to transfer the caller. If the Call Centre line is busy, do not automatically transfer the call – ask for the customer’s name and contact number and reason for their call. Send an email to “Lindsay Service Centre/Call Centre” and ask them to contact the customer for assistance.

Email / Correspondence

Accessibility

The City of Kawartha Lakes [Accessibility Policy](#) statement expresses the commitment to provide quality goods and services that are accessible to all persons. The Corporation of the City of Kawartha Lakes will strive to provide goods and services in a manner that respects the dignity and independence of each individual; one that integrates each individual as fully as practicable into the method of service delivery and that ensures that people with disabilities have an equal opportunity to use and benefit from the goods, services and areas provided by the Corporation of the City of Kawartha Lakes. The policy addresses 4 (four) procedures: [Assistance of a service animal](#); [Assistance of a support person](#); [Feedback process](#); [Notice of temporary service disruption](#).

The “[May I Help You](#)” guideline available within the accessible customer service training package provides information on how to engage/serve people with varied/different abilities. More information is also available from [Access Ontario](#).

Generally, and unless otherwise directed by policy or legislation, staff should respond to customers in the same format used by the customer (emails are responded to by email, letters are responded to by letter, etc.)

An individual who has trouble hearing may communicate through email as they find it easier to communicate their concern and to receive your response in writing. Hearing your response may be difficult or impossible for them. Responding to people in the manner in which they make contact respects dignity.

Utilize the City of Kawartha Lakes corporately adopted font and size of Arial 12 point when sending emails or written correspondence. City employees are to be aware of the

[Accessible Formats and Communications Supports Management Policy](#) and the [Accessible Documents Information Guide](#).

Correspondence Response Time

Letters:

Customers will receive a response to a general inquiry within five (5) business days.

Email:

Customers will receive an initial response to an email inquiry within two (2) business days. This refers to both internal and external communication.

Social Media:

The Communications division is responsible for monitoring and responding to social media on behalf of the City of Kawartha Lakes. Exceptions include divisions that have social media accounts of their own. These divisions are responsible to adhere to the Social Media Management Directive.

General Guidelines for Correspondence:

- Utilize the spell check tool whenever necessary for all corporate documents
- If you are unable to provide a complete resolution to the issue, respond to the customer and outline the next steps
- If you have received a written/verbal request in error, re-direct the request to the appropriate employee/department as soon as possible for resolution
- All correspondence should include staff contact information for the customer to contact you directly

Email

A standard email signature is required by all City staff for internal and external emails as follows:

Jane Doe, B.Sc.

Position Title

Division or Department, City of Kawartha Lakes

705-324-9411 ext 9999 www.kawarthalakes.ca



Refer to Appendix B for instructions to create the standard signature block.

The following confidentiality disclaimer will be included automatically with external emails:

This message, including any attachments, is privileged and intended only for the addressee(s) named above. If you are not the intended recipient, you must not read, use or disseminate the information contained in this e-mail. If you have received this e-mail in error, please notify the sender immediately by telephone, fax, or e-mail and shred this confidential e-mail, including any attachments, without making a copy. Access to this e-mail by anyone else is unauthorized.

Email Out of Office Assistant

Staff are expected to utilize their “Out of Office Assistant” when away from the office and unable to check messages. The message should include duration of absence, appropriate message and alternative staff contact details. Samples are as follows:

Internal:

Currently, I am out of the office until Monday, February 14, 2018 and will be responding to emails upon my return.

If you require immediate response, please contact Jim Rogers at jrogers@kawarthalakes.ca or by calling 705-324-9411, ext 9999.

Have a great day!

Mary Smith
(include appropriate email signature)

External:

Thank you for contacting the City of Kawartha Lakes.

Currently, I am out of the office until Monday, February 14, 2018 and will be responding to emails upon my return.

If you require immediate response, please contact Jim Rogers at jrogers@kawarthalakes.ca or by calling 705-324-9411, ext 9999.

Have a great day!

Mary Smith
(include appropriate email signature)

In the event of an **unexpected absence** (ie illness, emergency, etc.), and depending upon the nature of the position and duration of absence, an employee’s Manager may contact IT

to have a standard City reply added to the email as follows:

Thank you for contacting the City of Kawartha Lakes.

Currently, I am out of the office and unable to respond to emails. In my absence, please contact Jim Rogers at jrogers@kawarthalakes.ca or by calling 705-324-9411, ext 9999.

Have a great day!

Mary Smith
(include appropriate email signature)

In the event of an **expected absence** (ie retirement, leave of absence, etc.) an employee's Manager shall contact IT to terminate the email address or have a standard City reply added to the email as follows:

Thank you for contacting the City of Kawartha Lakes.

Please be advised that Mary Smith has retired effective January 1, 2018. Your email will be forwarded to the applicable staff person for review and an appropriate response.

If a temporary response is required for a period of time, the Manager is responsible for terminating the staff email at the appropriate time.

Refer to Appendix B on how to “Turn on/off Out of Office Messages”

In Person

Some business entrances have staff at the front who are within plain sight and readily accessible to assist customers. At times, staff may be required to step away momentarily, at which point the public service area will be monitored by other designated City staff.

Should staff be required to attend to telephone and counter enquiries simultaneously, counter enquiries shall take priority with telephone enquiries attended to as soon as possible afterward. Callers have the option to leave voice messages, which should be returned promptly after the customer at the counter has departed.

During regular hours of operation, the City Dress Code Policy is in effect.

In General:

- ✓ Greet customers in a warm and professional manner
- ✓ Provide prompt service and serve customers in the order they arrive
- ✓ Show courtesy and respect even if the customer is upset

- ✓ Provide good customer service to assist the customer with the service/information. Avoid saying “That’s not my department” or “I don’t know who does that in the City so I can’t help you with that”
- ✓ If you are not able to assist, ensure that the customer has the correct point of contact – do not guess. If you are unsure, ask or call a colleague so that the customer will be guided to the appropriate department
- ✓ If you work outside the office, ensure you properly identify yourself as a City of Kawartha Lakes employee. Wear your ID badge and/or proper City logo attire; business cards should be available upon request. If you require general business cards that direct customers to the Service Centres for assistance, please contact the Manager of Customer Services

Meetings

Adherence to proper etiquette for a meeting establishes respect among meeting participants. Some general guidelines include:

- Accessibility - whether with staff, volunteers or the public, know your audience and if possible, encourage disclosure of any accommodation needs (see pages 44 to 48 of the [City of Kawartha Lakes Guide to Accessible Information and Communication](#)). Be mindful of booking public meetings at accessible places
- Arrival – arrive at the location a few minutes early to allow time to find a seat and be prepared before the meeting starts
- Introductions – ensure everyone in the meeting knows one another – ensure that guests are introduced and their purpose
- Agenda – meetings should have an agenda circulated within three (3) days prior to the meeting with the meeting start and end times clearly established
- Strong Agenda and Productive Meeting – ensure that the meeting is of value; the agenda may have items that require timely responses or communication; keep the meeting short and productive to respect staff’s busy schedules
- Be Prepared – participants should come prepared to speak to the agenda items (if necessary) by pre-reading the package or agenda that was circulated
- Speaking – keep the meeting organized by speaking when you have the floor; listening intently when you don’t
- Understand the Unwritten Speaking Rules – be polite and respectful of everyone speaking; don’t interrupt
- Cell Phones – turn cell phones off while in the meeting; if you are expecting an important or emergency call, inform the Chairperson prior to the start of the meeting – leave your phone on vibrate and leave the room if necessary to take the call

-
- Meeting End – Ensure the meeting ends on time, leaving outstanding items for another meeting; leave the meeting room in the condition it was upon arrival. Turn off lights!

Service Requests

Service requests are created for customer issues and maintained in the Corporate tracking system. Customers can report an issue through Customer Services, the appropriate department, or through the website. Service requests are issues that cannot be resolved at the first point of contact.

Requests to Speak with the Mayor or Councillor

If a customer indicates that they would like to speak with the Mayor or Councillor regarding an issue:

- Ask if you are able to provide assistance. It may be an issue that staff can assist with that can be logged into the issue tracking system. The Executive Assistant to the Mayor and Council or Customer Services staff are available to assist and speak with the customer
- If it is a matter that cannot be resolved by staff, or the customer wishes to speak with the Mayor/Councillor directly, provide the option to speak with the Executive Assistant to the Mayor and Council or provide the Mayor/Councillor contacts as they appear on the website. More information is available at [Mayor and Council](#)

All staff are encouraged to direct customers who wish to report an issue through the website or contact Customer Services directly. The issue is tracked through Report It and JDE CASE; reference numbers are provided to the customer, should they wish to refer to the issue at a future time.

If a customer already has an issue reference number, but wishes to have an update, refer them to the appropriate department or Customer Services.

Customer Feedback, Measuring and Monitoring

Customer feedback is an integral component of service delivery at the City of Kawartha Lakes. The City will embrace “Municipal Service Excellence” and seek feedback. The City recognizes the value of public input and will monitor feedback to ensure continuous improvement.

There are several customer service access points on the website to contact the City:

- Compliments
- Report It
- Contact Us

- Website Feedback
- Complaints
- Municipal Service Centres

Compliments

Compliments are forwarded to the Communications division at communications@kawarthalakes.ca and shared with staff via the appropriate venue (ie employee website, Manager, etc.)

Report It

The City website offers several links for customers to submit a service request.

Reporting an issue or concern is also accessible from the “I’d Like To” drop down menu at the top of the page.

The Report It page lists the top several issues that are received in CASE Management. When a customer submits the form, they will receive an automatic message as below:

“Thank You for contacting the City of Kawartha Lakes. Your issue has been submitted for review and your reference number is 2017-08-10-004.”

The issues are directed to the applicable department for response to the customer.

Contact Us

There are many ways to contact the City, however, the main contact is:

City of Kawartha Lakes
[26 Francis Street, P.O. Box 9000](#)

[Lindsay, Ontario K9V 5R8](#)

Tel: [705-324-9411](tel:705-324-9411)

Toll Free: [1-888-822-2225](tel:1-888-822-2225)

Emergency After Hours Line 1-877-885-7337

Website Feedback

The City website provides an avenue for customers to comment on the website and make suggestions for improvement. Look for the link in the footer of every page. The data is tracked and responded to by Communications.

Complaints

The City of Kawartha Lakes is committed to a consistent and uniform process to respond to complaints received from members of the public regarding programs, facilities, City services, City staff and procedures. The policy and the accompanying Management Directive and Standard Operating Procedures outline the process to be followed and service standards for the handling of public complaints.

The City of Kawartha Lakes recognizes the importance of public feedback and welcomes constructive complaints as a valuable form of feedback regarding services, operations and facilities. The information gained from complaints helps to improve the quality of the services provided by the City and the customer experience of residents. More information is available at [Corporate Complaints](#).

Municipal Service Centres

Four Municipal Service Centres are located throughout the City of Kawartha Lakes: Lindsay, Coboconk, Bobcaygeon and Omemee. Service Centres operate Monday through Friday from 8:30 a.m. to 4:30 p.m. Service Centres offer a variety of services available to residents and visitors. Customer Service Representatives are available at each location to assist. More information is available at [Municipal Service Centres](#).

Tips for Positive Interaction

- Listen intently; be positive
- Respect cultures and diversity
- Evaluate and clarify customer expectations; ask questions to understand
- Understand that each customer's need is different and respond promptly and professionally
- Show understanding and empathy, and be diplomatic
- Ensure your words, voice, tone, body language and facial expressions are aligned
- Remember that customers are contacting the City for assistance. Focus on the drivers of customer satisfaction:
 - Timeliness and acknowledgement
 - Knowledge
 - Fairness
 - Courtesy
 - Outcome

Tips to Deal With:

- Verbal abuse: Stay calm; be firm and respectful with the customer and advise that verbal abuse will not be tolerated. Inform your Manager/Supervisor immediately
- Threats: Inform your Manager immediately
- Complaints about City employees: Provide the confidential information to your Manager. The Manager will contact Human Resources

Measuring Success - Random Audits/Surveys

All City staff are expected to comply with the Corporate standards contained within this document. As a monitoring tool, the Manager of Customer Services will perform random audits monthly to ensure compliance. The audits will remind City staff of the expected standards.

An internal and external survey was performed in 2017 as a benchmark to performance. Accordingly, these surveys will be re-circulated regularly to compare and analyze information.

Departments will be responsible to regularly track cycle time of customer inquiries/cases.

Feedback will be gathered for continuous improvement.

Departmental Standards

Some departments have standards that are required as a part of their department's business. Ensure that you are aware of any departmental standards that may be in place.

The Corporate Customer Service Standards provide comprehensive minimum standards, however, departments may choose to implement a higher standard. There may also be unique business processes that have different standards, which would be approved by the CAO and Council as applicable. Each City employee is expected to adhere to the standards in place. Management staff will be responsible to ensure compliance.

Review

The Corporate Customer Service Standards will be reviewed annually.

*“I’ve learned that people
will forget what you said,
people will forget
what you did,
but people will
never forget
how you made them feel.”*

Maya Angelou

Appendix A - Voice Message Samples

In Office

Hi! You've reached Mary, Administrative Assistant in Planning at the City of Kawartha Lakes. I am in the office today, but unable to take your call at this moment. If your call is urgent, please dial 1234 before the end of this message and speak with Jim.

Otherwise, please leave a message and I will return your call as soon as possible.

Thank you for calling the City of Kawartha Lakes and have a great day.

Out of Office

Vacation Alert. Hello. You have reached Mary, Manager of Parks and Recreation at the City of Kawartha Lakes. I will be out of the office from June 1st to June 15th. If you would like to leave a message, I will return your call upon my return to the office.

If you require immediate assistance, please dial 1234 before the end of this message and your call will be transferred to Jim.

Thank you for calling the City of Kawartha Lakes and have a great day.

Specific Working Hours

Hi! You've reached Mary, Building Inspector at the City of Kawartha Lakes. I am in the office during the hours of 8:30 to 10:30. If you are calling outside of these hours, please leave a message and I will return your call as soon as possible.

If your call is urgent, please dial 1234 before the end of this message and you will be transferred to Jim for assistance.

Thank you for calling the City of Kawartha Lakes and have a great day.

Part Time Staff

Hi! You've reached Jim, Fitness Instructor at the Lindsay Recreation Centre at the City of Kawartha Lakes. I am unable to take your call at this moment, but if you would like to leave a message, I will return your call when I am back in the office. As my shifts vary, you may wish to dial extension 1234 before the end of this message and you will be transferred to Mary for assistance."

Thank you for calling the City of Kawartha Lakes and have a great day.

Spare Phones

Hello. You have reached the Weldon Room Boardroom at the City of Kawartha Lakes. **This phone does not record messages** – for immediate service, please dial 1234 before the end of this message and speak with Mary.

Thank you for calling the City of Kawartha Lakes and have a great day.

General Mailbox Line

Hello. You have reached the Bobcaygeon Service Centre for the City of Kawartha Lakes. We are currently servicing another customer.

Please leave your name, number and reason for your call and we will return your call as soon as possible. Office hours are 8:30 am to 4:30 pm.

Thank you for calling the City of Kawartha Lakes and have a great day.

Appendix B –Email Instructions

Email Instructions

To Turn on Out of Office Message

- Click on File
- Click on Automatic Replies (Out of Office)
- Click on Send Automatic Replies
- Click on Only Send During this time range:
- Choose your start date and time
- Choose your end date and time
- Enter your message for Inside My Organization
- Click on Outside My Organization and enter your message
- Click OK

To Turn OFF Out of Office Message

- You don't need to turn this off if you selected end time and date as per instructions above

If not,

- In Outlook, choose File, Info, Click on Automatic Replies, Click on Do Not Send Automatic Replies

To Set Corporate Signature as Default

- Microsoft Outlook Mail Menu, choose File, Options, Mail, Signatures
- Click New and enter a title for this (ex: your name)
- Enter your signature
- Press OK

Use the following format for your signature:

Jane Doe, B.Sc.

Position Title

Division or Department, City of Kawartha Lakes

705-324-9411 ext. 9999 www.kawarthalakes.ca



- Font for the signature is Arial 12 pt
- **BOLD** your name and credentials (if applicable)
- Include your Division, your Department, both, or neither, depending on relevance
 - For example, if your title is Human Resources Officer you do not need to say you are part of the Human Resources Division as it is evident from your title
 - If you are an Administrative Assistant (a position in many departments) you should include your Division and/or Department
- The City logo to be used can be found on SharePoint under Corporate Documents/Reference Materials/Corporate Branding
- **The City of Kawartha Lakes logo is the only graphic allowed on your signature**
- The website address should be included as www.kawarthalakes.ca. In the case of Library and Economic Development staff, the website addresses for those specialized websites can be added
- The use of personal messages (e.g. quotes, sayings, slogans) is prohibited
- Email addresses, physical addresses, and fax numbers are not required in the standard signature
- Cell phone numbers can be included
- The use of background patterns in email is prohibited
- Credentials associated with professional designations are appropriate
- Emails that are sent from a shared mailbox do not require a personal signature, however, a departmental signature is recommended

NOTE: The confidentiality disclaimer will be automatically added to all external emails beginning December 4, 2017. If you have a confidentiality disclaimer already set up in your signature block, please delete it, otherwise the customer will receive it twice.