Intro to Digital

For Municipal Leaders

Module B: Set your Digital Vision and Plan (What)

Perry Group Consulting Ltd.

🙏

Thanks for coming back
and giving up your time to
be here

Logistics

- Lots to pack in – we are going to go fast (again)

- 3-hour session – presentation, a few brainstorms and group discussions throughout (jot down questions and we can come back to them)

- 2 x 10-minute breaks. 1 every hour 😀

- Slides shared in the chat – grab your own copy if you want to notate
  - https://www.perrygroupconsulting.ca/digital-academy

- We are recording the session for those that can't make it

Key Takeaways – Module A

- High digital adoption rates for digital services (92% online, 88% banking, 80% for City online services)
- Digital – not if, but when. The time is now – COVID as a tipping point
- Own your service and its delivery mode
- Focus on the customer / listen to their needs and expectations
- Design your service for your customer

"Digital transformation is not just about technology and it's implementation, it's about looking at the business strategy through the lens of technical capabilities and how that changes how you are operating …"
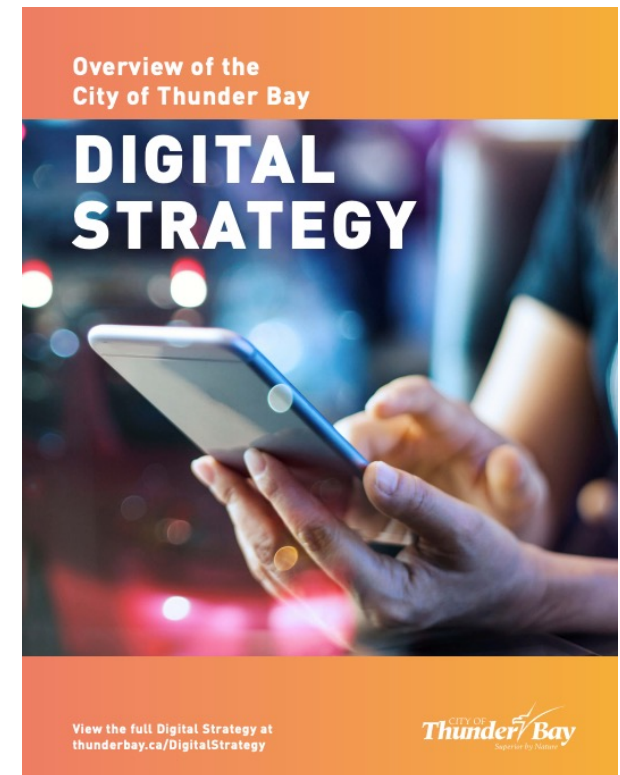
Driving Digital – Isaac Sacolick

Reflecting

- Did you have any reflections on what we discussed last time?

- Anything that came to you after the session that is worth discussing?

- Any questions you wanted to raise?

Topic Outline

What does the Digital Strategy mean for me?

- It means as a service owner thinking about how to deliver your services in the digital era – the internet and smartphone era

- Taking steps to:
  - modernize your service,
  - equip your staff with tools and capabilities to manage in the digital world
  - deliver services in a way that customers want to interact with you

- You can't hide and hope it goes away 😆

Overview of the City of Thunder Bay

DIGITAL STRATEGY

View the full Digital Strategy at thunderbay.ca/DigitalStrategy

CITY OF Thunder Bay Superior By Nature

Module B – Session Goals

- Hopefully feeling inspired from our previous conversations

- We want to help you think about how to go about planning for the modernization / digital transformation of your services

- We want to equip you with some of tools and approaches that will make you better *commissioners of work* from your teams, partners, and providers as they help you digitally transform

Before We Get Started

Digital Transformation
A Formative Story

Municipal Service – Land Charge Search – required for all properties bought in the municipality

Pre-Digital Transformation

- 6 staff
- 30-day turnaround
- Significant backlog, failing to meet 30-day timeline
- Paper process – required customers/law office staff to visit City hall to access service
- 1 paper property card for every property in the City
- Updated through memo from all departments to Land Charges Team

Digital Transformation
A Formative Story

Municipal Service – Land Charge Search – required for all properties bought in the municipality
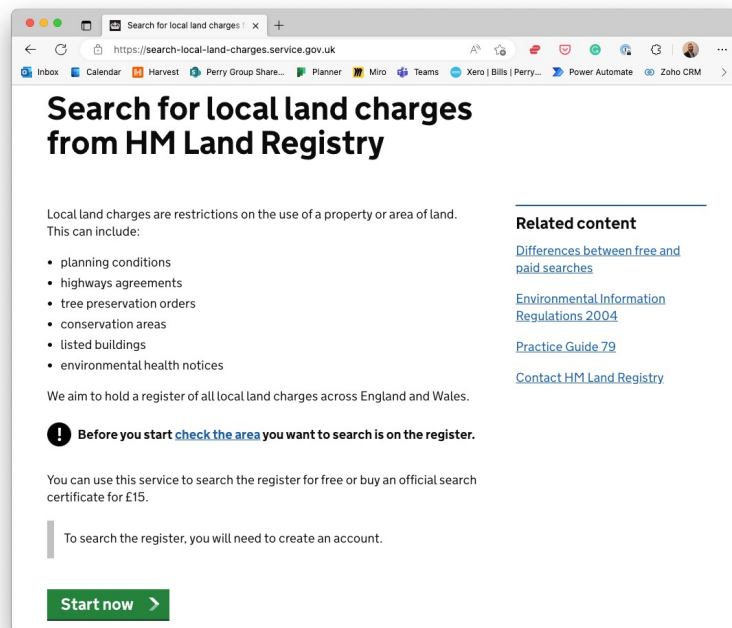
Post-Digital Transformation

- 2 staff (4 staff reallocated)

- 60-minute turnaround (down from 30 days)

- Online service, register, request, pay online

- Automated report generation, with manual review before report dispatched to customer

- Digitized records, automated updating from City databases

Analytics

Online

Digital
Process

Back Office
Systems

Impacts

Area	Impact
People	- Gradual introduction of service changes and retraining of staff - Worked closely with union representatives to communicate and plan for service and people changes - Fewer staff needed to operate service – staff reallocated within council - Changed job descriptions for those that stayed – higher grade - Training and support for customers during transition
Process	- Complete re-think of service delivery and supporting processes - Radically improved customer experience, turnaround speed - Active promotion of online service to customers - Reduced cost to operate, passed on to customer to incentivize adoption
Technology	- New online service – included request, payments, reporting - Back-office technology to process requests / review - GIS and integration-based data loading - Relied on high quality data quality – required new data QA processes - Historic data conversion and loading

Fake Digital

- We could have created an online form for customers to request the service online – would have improved customer experience a small amount

- But if
  - Online form requires retyping the data into a back-office system, or
  - The back-office process still relied on checking paper cards

- We couldn't have reduced the turnaround time, reduced staff requirements – we would have missed the real opportunity

- Avoid **Fake Digital**

Don't pave the cow (wrong) path

Identifying Fake Digital

- What other forms of fake digital do you think there are?

- Can you think of some examples that you've seen or experienced?

Don't Miss the Opportunity

- Digital represents an opportunity to rethink completely the service

- It's critical not to bring old assumptions (we need a signature, we need 10 paper copies, we can't share this information) into new digital services

- When designing new services challenge and question everything
  - Use the 5 why's technique (5Y) – to understand current state and barriers for the future "why do we …", or "why can't we"?
  - Seek outside perspectives – my team is saying this, is this right?

- Talk to customers, talk to other municipalities

Using the 5 Whys Process

Asking why until you get to the root of the problem

- You have launched new software for handling expenses, staff have been trained but are not using the software.

- You pull together a group of users and you ask
    - "**Why** aren't you using the software?"
    - They say they don't like it and it's a pain to use?
    - You ask: "**Why** don't you like it, why is it painful to use?"
    - They tell you the system asks for information they don't have.
    - You ask them "**Why** they don't have the necessary information?"
    - They say the system wants scanned receipts, which is OK, but also wants them to itemize each line item – and sometimes the receipts don't list individual items.

- The root problem – teams often don't have the information the system requires, what should the guidance be to users of the software in this situation?

- Use this method to challenge your and your teams assumptions, to ask why can't we or what if?

Think Big / Think Different

Don't Miss the Opportunity

- Blockbuster → Netflix

- Garbage Bag Tag → Buy Online, Print at Home → Digital Bag Tag
- Library Fines → Pay Online → Abolish Library Fines
- Road Patrol → AI Camera/Sensors Attached to all City Fleet
- Transit Fares → Electronic Fare Card → Tap to Pay
- Routed Buses → On-Demand Transit

Digital transformation is a marathon not a sprint

It's a journey, not an event

Don't take shortcuts – put in the hard work

Remember that Leaders in Digital

Have been working at the coalface for longer than you think

- Amazon: 27 years
- Google: 23 years
- Facebook: 18 years
- Twitter: 16 years
- Microsoft: 47 years
- Apple: 46 years

- CIBC introduced ABM in 1969, Telephone Banking in 1992, Online Banking in 1996, 2010 iPhone App

Grind

- Digital Transformation is not a singular event

- There are launches … but

- It's grinding improvement building on improvement, building on improvement and so on

Incremental Improvements Add Up

- Think good habits - fitness, dieting, etc.

- Think about the smallest unit of delivery

- Think about building on the previous element

- This helps with change management, keeps costs, commitments and complexity lower, shortens delivery timeframes, builds momentum, allows you to celebrate success and recalibrate if necessary

A Digital Mindset

Adopting a Digital Mindset

A focus on customer needs and experiences: Digital transformation requires a customer-centric approach, where technology is used to improve the customer experience and drive business value.

- **A willingness to embrace change:** Digital transformation requires being open to change and to being willing to adopt new processes and technologies.

- **A culture of continuous learning and adaptation:** Digital transformation requires being open to new ideas and approaches, and to be willing to experiment and test, to continuously learn and adapt as technology and customer needs evolve, failures will happen – be ready to learn from them.

- **A focus on collaboration and cross-functional teamwork:** Digital transformation often involves working across departments and with external partners, and requires a culture of collaboration and teamwork to be successful

- **An emphasis on data-driven decision making:** Digital transformation requires leveraging data and analytics to inform business decisions and drive innovation.

Bias to Action

- "Perfect is the enemy of good"

- Don't get lost in **analysis paralysis** – good enough is good enough

- No decision is forever

- Quick effort and move on to the next thing

- If you don't have the data, rough estimates are good enough

All Management Best Practices Apply

- Clear leadership
- Communicate expectations
- Focus on outcomes and delivery
- Projects must be resourced – can't be done off side of desks
- Must be well structured and governed
- Plan for and execute change management plans
- Monitor closely
- Celebrate success, learn from failures

Mapping out the Journey to Digital

1. Build a Coalition

- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

2. Identify the opportunities

- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
- Identify services, define profile and current performance
- Talk to customers

3. Form a Vision, Identify Initiatives

- Collectively define and communicate how the future will be different from the past and how you will make that future a reality through initiatives linked directly to the vision.
- Identify key initiatives (backlog) + set out strategy

4. Build Buy In and Urgency

- Help others (in your team, across the organization) see the need for change
- Identify key change agents that will help communicate/sell the change
- Bring everyone up the mountain

5. Build the Team

- Dedicate the right resources
- Build a multi-disciplinary team – project lead, analyst, developer
- Co-locate if possible

6. Remove Barriers

- Protect the team
- Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
- Design the future

7. Short Term Wins

- Implement quick, initial wins that form part of the bigger story.
- Launch, learn and improve
- Recognize, communicate and celebrate successes early and often – to energize the team to persist.

8. Sustain Acceleration

- Build momentum
- Press harder after the first successes.
- Be relentless with initiating change after change until the vision is a reality.

9. Embed Change and Iterate

- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

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Reminder

- A Service is what a customer wants to get done
  - Not "zoning", but

  - lookup zoning at a location
  - find out what my zoning means for me and my project (restrictions, requirements)
  - find out if my project requires a zoning change
  - talk to a planner to understand the impact
  - get a zoning clearance certificate
  - get a zoning compliance statement
  - apply for a zoning change

Service ownership

- Who owns a service?

- Who is accountable for the steps and tasks (the business process) that make up the service experience?

- Who is accountable for the service experience?

- Who is accountable for ensuring that the service is delivered in a modern way?

Service Ownership

- Thoughts?

Accountability for Digital Service Delivery

- **Accountability:** The Service Owner

- **Commitment***: All service owners, whether providing services internally or externally, should design them to be digital-first.*

- **Shared Responsibility:** Service Owners work must with partners in IT and others to design and deliver the service digitally

- It's your job to provide a service fit for 2023

Service Owner is the

DRI

Directly Responsible Individual

if you want to go fast, go alone,

if you want to go far, go together

Build a Coalition

- Who in your team shares a desire to modernize?

- Who has a level of tech savviness that you can use?

- Who is influential and can help others get on board? Are there naysayers that you can involve in the process – would that help?

- Who is eager to show what they can do?

- With whom do you need to partner? Don't go alone. Bring them with you.

- What senior staff do you need to bring along with you?

Discussion

Know the Landscape

1. Build a Coalition
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Know your starting Point

Environmental Scan

Find out who the best in your field are at digital services
- You can start with: Calgary, Surrey, Markham, Mississauga, Kelowna, Saskatoon

Look at the websites of neighbouring and bigger municipalities
- Search wikipedia for the Top 100 Municipalities in Canada

Compare with other utilities or private service providers in your sector

Talk to your professional associations

Look beyond your locality – Ontario, other provinces, US, UK, Australia

What services do they offer online in your business area?

What does good practice look like? Who are you envious of?

Know your starting Point

Environmental Scan

Avoid being a copycat

Reach out – talk to them, listen and learn, be curious they will be happy to share

Find out how they did it – not just what software they use
- Who – led the work, was involved, how did they staff the work, what post-implementation resources do they need?
- What – what did they do, in what order, what solution(s) did they use?
- Why – what did they think the drivers were, and what have they learned since, have they changed?
- How – did they approach the project, RFP, vendor partnership, governance?
- Lessons – what would they do differently if they did it again, what advice can they offer?

Know your starting Point

Vendor Scan

Know the art of the possible - scan / look / listen / learn

What does the vendor landscape look like?
- Visit websites, watch webinars
- Look for new players in the vendor eco-system
- **There is never just one solution**
- Search out alternatives to a solution – tip: google similar to "SAP"
- Explore what you already have under your nose
- Avoid falling in love with the perfect solution too soon

Assess what new business functionalities are available and are coming up

Know your starting Point

Work with Strategic Partners
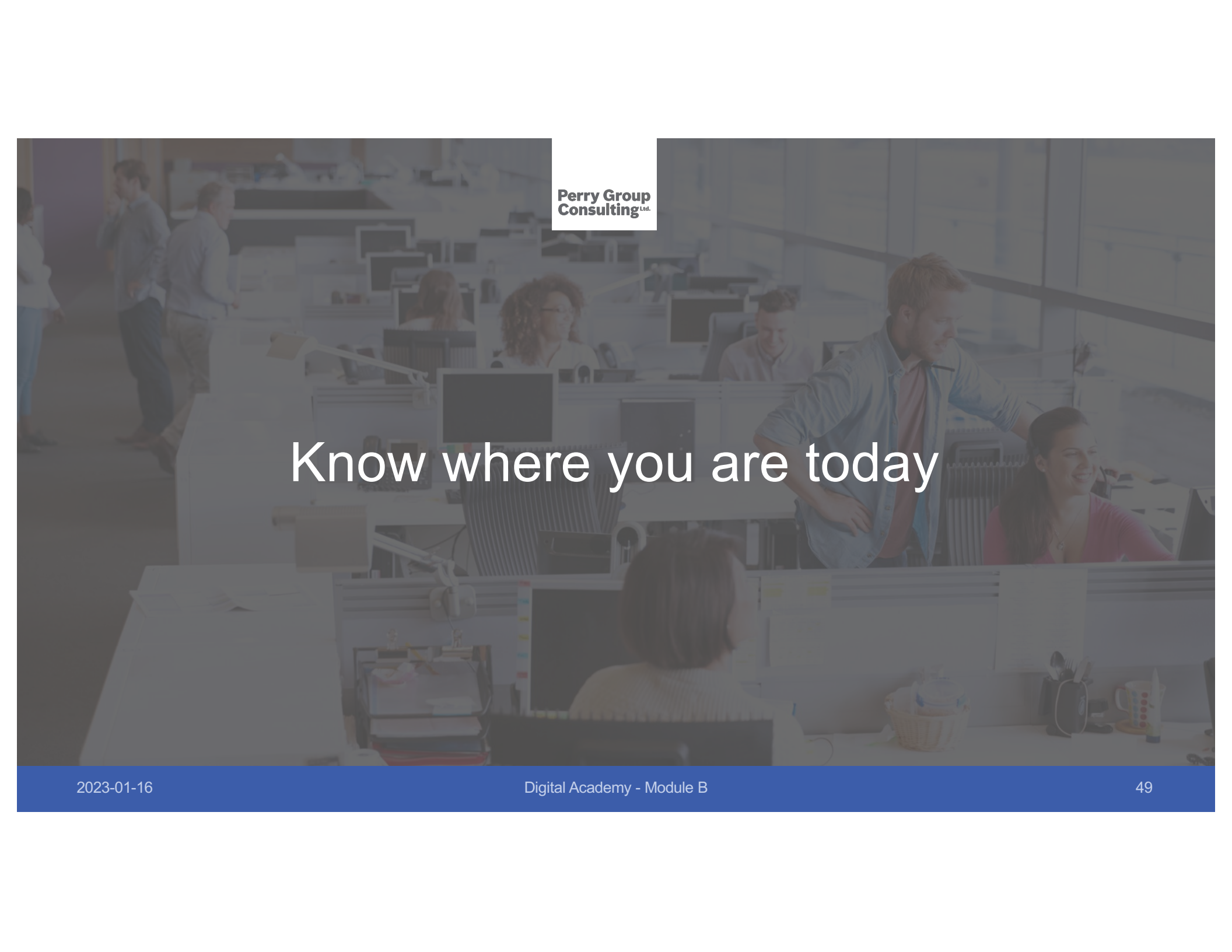
- Work with your partners in IT, web and other relevant partners (Finance) in your scan, help them and have them help you understand

- Also remember that we are focusing on **services**, not solutions
  - Solutions help deliver services

Who are 2-3 municipal leaders
in your space? Who are you envious of?

What do they do
that's impressive?

Takeaways

- Assessing what other municipalities have done to transform business process is important to learn from their experiences – the good and the bad
- As a business leader/owner, it is important for you to know what vendors are offering (capabilities) and where the trend is heading
- Try to understand and determine what the opportunities are for your business area
- Partner with the IT Director/CIO to compare your current digital capabilities with what others are doing and what the vendor market is offering
- Note: alignment with organizational priority is critical to gain support for large business transformation that impact other departments/services

Know where you are today

Know where you are

Next for each of your business areas, it is important to understand where you are:

a)   Build a service inventory

b)   Conduct a digital maturity assessment – figure out the extent to which your services / business processes are digitized and digital

c)   Consult with citizens / customers – seek their feedback, capture their needs and pain points

d)   Consult with internal staff – understand readiness, capacity and identify opportunities

These inputs will help you establish a baseline – your starting point before change

Know your Services

Recap: What is a service?

A service is any activity that helps someone complete a task.

Service Design Playbook

Ontario

- What are some examples of services that your team offers?

- Remember to think from the customers perspective.

- What are they looking to do?

Build a Service Inventory

- Review what services you offer

- Identify the business processes related to a particular service (e.g, water meter installs, water meter reads, water billing, etc.)

- This will be the basis to identify

- Which are my most   *used*   services and processes
time consuming
error generating
complaint generating
disliked
complex

Sample Service List

An Extract

Function	Service Area	Service
Land, Planning and Development	Development Approvals	Submit a Pre-consultation Application
Land, Planning and Development	Development Approvals	Book a pre-consultation meeting
Land, Planning and Development	Development Approvals	Submit and manage an application for a Minor Variance
Land, Planning and Development	Development Approvals	Submit and manage an application for a Consent / Lot Severence
Land, Planning and Development	Development Approvals	Submit and manage a Site Plan application
Land, Planning and Development	Development Approvals	Submit and manage a Plan of Subdivision application
Land, Planning and Development	Development Approvals	Submit and manage a Plan of Condominium application
Land, Planning and Development	Development Approvals	Submit and manage a Plan of Condominium Conversion application
Land, Planning and Development	Development Approvals	Submit and manage an application for a Part Lot Control exemption
Land, Planning and Development	Development Approvals	Submit and manage a Telecommunication Tower application
Land, Planning and Development	Development Approvals	Find and Access the Official Plan
Land, Planning and Development	Development Approvals	Submit and manage an application to amend the Official Plan
Land, Planning and Development	Development Approvals	Submit and manage an application to amend the Zoning Bylaw Amendments
Land, Planning and Development	Development Approvals	Get reviews from other municipal partners and agencies
Land, Planning and Development	Planning Advisory Service	Complete partner and agency Development Approval consultations
Land, Planning and Development	Development Appeals	Appeal a Development Application
Land, Planning and Development	Development Approvals	Prepare and finalize a Development Agreement
Land, Planning and Development	Community Consultation	Participate in a Public Meeting
Land, Planning and Development	Heritage Properties	Search the Heritage Register
Land, Planning and Development	Heritage Properties	Request an addition to the Heritage Register
Land, Planning and Development	Heritage Properties	Get permission to do work on a structure in the Heritage Register
Land, Planning and Development	Community Consultation	Search publicly available information about development approvals
Land, Planning and Development	Zoning	Get a zoning compliance certificate
Land, Planning and Development	Zoning	Get a zoning clearance / removal of a holding symbol
Land, Planning and Development	Zoning	Request a preliminary review of proposal to determine areas of noncompliance with the Zoning by-law
Land, Planning and Development	Zoning	Find and access the Zoning By-law / lookup my Zoning
Land, Planning and Development	Zoning	Submit and manage an application for a Zoning Change
Land, Planning and Development	Zoning	Submit and manage an application for a Zoning Exemption

Perry Group Municipal Service List (MSL)

- You can make a start with building your own service list by using Perry Group's MSL

- It's in an Alpha stage – its messy, incomplete, and constantly being improved … but it may be a useful starting point

- We maintain and post the MSL at our website - http://www.perrygroupconsulting.ca/msl

Know your Digital Digitized Maturity

A simple digital maturity assessment

- For each of your services, take time to reflect
  - Are you using paper? Excel? A system?
  - Do you have staff typing information in after the fact?
  - Does information get typed into different systems?
  - When does information go into a system?
  - Is digitization across many systems or 1 system?
  - Does digitization support and connect customers, front office, back office, field office?
  - Is the technology fully implemented? Are you using all the capabilities?
  - Is the technology reliable, up to date, user friendly etc.
  - Is the technology optimized to give citizens a good experience

Digital   Digitized / Digitalization

Analytics

Online   Digital   Mobile
                              Process

Front Office   Back Office   Mobile Office

How Digitized
is my process/service?

For each of your services consider:

User:
"This process is so old fashioned"

1. Paper Process

Majority of process is paper based

User:
"This is not that great"

2. Excel / Access - Tracking

Majority of the process is tracked in Excel or other non-systematized solutions

User:
"This is good, but there's more to do"

3. Partially Systematized

Some processes have been digitized into a system, information about most aspects of the process is tracked We use a software application for most of the tasks and Excel for some tasks.

User:
"We have almost everything we need"

4. Systematized

Majority of steps in service have been digitized into a system, information about all aspects of the process is tracked in real time.

User:
"We are running an efficient, modern operation"

5. Real time workflow

All processes have been digitized using workflow capable technology. Our digital processes use e-signatures, e-workflows, e-documents. There is almost no paper use. Our digital processes are integrated with multiple busines applications and are cross functional in nature. Performance SLAs are set.

Back Office

How Digital
is my process/service?

For each of your services consider:

Customer: "This process is so old fashioned"

1. Paper Process

Information about the process available online. All processing steps offline.

Customer: "This helps, but is not great"

2. Some Online Forms

PDF, word forms available for download

Customer: "This is so much easier than before"

3. Online Service

Online fillable forms or online app to apply for services

Customer: "This service is intuitive and fast"

4. End-to-End Transactions

End-to-end transactions – ability to complete fully online, integrated with back-office technologies.

Customer: "This organization gets me"

5. Digital Transformation

Fully digital service, end-to-end transactions designed around a digital process. All transactions with the organization are available online, integrated through one interface. Customers have a single sign on and similar experience with all interactions. The system understand customer needs and caters based on context.

Front Office

Maturity by Service

Service	Internally Digitized	Digital Service
Service 1	3	1
Service 2	2	1
Service 3	2	2
Service 4	4	4

- You may have a low rating on all / many of your services.

- That's OK.

- Now you know.

Understand your service profile

- Next, gather data about each of your services so that you have a full picture of your service profile

- You will use this data to help you prioritize your investment / effort

Suggested Data to Collect

About your services

Service	Service Complexity	# of Annual Transactions	% of total transactions	# of Calls / Complaints	# of Web Searches	# of Web Visits
Service 1						
Service 2						
Service 3						
Service 4						

Other factors that may be worth identifying?

- Long running process?
- ???
- ???

Data Drives Prioritization

Service	Digitized	Digital	Service Complexity	# of Annual Transactions	% of total transactions	# of Calls / Complaints	# of Web Searches	# of Web Visits
Service 1	3	1	Low	10,000	87%	2,000	10,000	100,000
Service 2	2	1	High	50	0.5%	50	500	5,000
Service 3	2	2	Med	150	1.3%	25	500	2,000
Service 4	4	4	Med	1,200	10%	25	500	5,000

Where is our effort best focused?

Takeaways

- Conducting a digital maturity assessment for your areas ahead of your digital journey will help you establish a starting point / baseline in:
- Business process, technology and resource:
  - Service process and their level of efficiency
  - Technology capability and how digitally enabled the services are
  - The level of digital readiness and skill sets availability in the team
  - Identify opportunities for improvements from staff
- It also helps to understand the community
  - Expectations - their current and desired future experiences
  - Readiness to embrace digital services
  - Input to shape the digital change through input

Know your Customer

Talk to your customers

- Capture their experiences, needs and pain points related to your services

- Value conversations and interactions over impersonal data collection (surveys)

- Ideas?
  - Front counter conversations
  - Conduct Open houses / workshops / surveys
  - Understand citizen expectations and appetite for change
  - Think about how to keep them involved in the change (testing, design sessions)
  - Recognize that there may be different customer segments and those segments may have different perspectives and thus different needs (large builders vs. weekend warriors, complainant vs. complainee)
  - Bring your staff / teams with you to hear this input – change management starts here

How do you talk to customers?

- You just talk to customers 😃

- Don't make it a big deal, don't over complicate it
- **Talk to them** during regular interactions – what do you think about our service? What could we do to improve the service? If you were in charge, what would you improve?
- Use existing forums to seek input
- Setup focus groups of customers to discuss service improvement opportunities

Structured Methods

- There are also more structured methods for talking to customers
  - Journey Mapping – understand the customer journey in using the service
  - Empathy Mapping – understand customer feelings and motivations
  - User Testing – watch how customers experience your services

- These are specific skills (user researcher, tester, business analyst)

- You may need help with from internal staff or external consulting support.

- We will discuss these in our next session.

Discussion

Get Input from Staff

Talk to your Team

An important way to build change readiness early

Talk to your staff to identify opportunities for each of the services being considered

- What do customers ask for?

- What are the biggest time sucks/ the areas that could be improved most?

- How can the process be simplified and become efficient?

- Be sure to challenge the status quo – use the 5 why's, or "what if …" framing to get staff to open up

- One of the main benefit of digital transformation is efficiency gained and data reliability – staff input matters

Take the Temperature

- Use these opportunities to informally assess the team's readiness for change

- Look out for tells
    - How does middle management react? Will they support / be a barrier?
    - Does the team see the value in the change?
    - Attitude to change - enthusiasm, reservation, negativity?
    - Confidence in chances of success?
    - Concern or excitement around job impacts?
    - Referencing previous (failed) efforts to change?
    - Does the team express or see the urgency?
    - Does the team flag risks?

Deep Dive into Processes

Review a Selection of Services

- Select a handful of services – 2 or 3 representative services

- Facilitate as-is service / process reviews to identify delays, duplication, wastage

- As a service owner you MUST be involved in this work. You need to understand how your service is delivered and experienced by customers.

- Even the smallest, simplest seeming processes have a ton of waste / cruft / assumptions – you must look closely – it will be worthwhile, we promise you

Region of Waterloo: 02-Children Services Portal As-is Process Flow With Savings | Perry Group Consulting Ltd. | December, 2022

Start

Funding Approvals: Same process for each letter (10 - 15)

1 Trigger: Funding application developed mostly annually for each funding stream

roughly 10 - 15 funding streams developed by ROW and funding comes from the Province

2 Within Q1, receive funding guidelines from the province.

Some funding lines are committed and don't change much

3 Funding applications are spread over the Q1/ 2 each year

4 Based on the priorities for the year, decide on rough timelines to send the letters out.

May change from year to year

5 Post the application form (Excel) on the portal. Has a deadline to submit by

D01-D15-Application1 (10 -15 application types)

Portal

6 Post an announcement on the portal

Portal | Email

7 Email the new application availability notice to all operators

60-70 operators

8 Operators go to the portal and download the Exel application form

9 Operators complete the application form

10 Upload to the portal. 1 doc for each site. Some operators have multiple sites.

120 – 130 sites

11 Staff can see all newly uploaded docs. Includes staff uploads as well.

Only need to see what operators have uploaded

12 Click download and save it to the DOCS system: Folder named by funding type

(E.g. maintenance) save as operator and doc type

eDOCS

13 Back and forth between the Region and operators about the application.

May use email for ease of use

Email

14 Final version saved in DOCS with version control

eDOCS

15 Latest version is uploaded to reflect the changes on the portal (some times).

A version discrepancy is possible

16 Copy reporting lines from the application to the Reporting table Excel sheet

D16-Reporting Sheet

17 Excel formulas calculate the funding eligibility for each site.

A

Potential time saved per site/letter type: 20 minutes

Page 1

Sample As-Is Process Discovery

Waste Bag-tags Service	
Statistics	60,000 tags sold/year, 40 locations and online
As-is Process Summary	**Bag Tag Request Process**: 23 steps, 6 systems (Email, CRM, POS, Website, eForm, Finance System), 43 Documents **Month-end Process**: 9 steps, 2 systems (Email, Finance System), 36 documents **Inventory Management Process**: 13 steps, 1 systems (Email) 2 documents **Status Inquiry Process**:17 steps, 3 systems (Email, SSRS, eForms) **Medical Exemptions Process**: 16 steps1 systems (CRM), 4 documents
Current State Highlights	30% online with a 4-week turnaround, online orders manually entered in CRM, physical tags sold via 40 locations, manual inventory, manual distribution, manual invoicing
Opportunities	Integrate online form with CRM, automate inventory management, pre-payment for vendors, digital tags (explained later)

Assess Your Service Against the Good Service Standard

1.0   Good Service Assessment

1.1.   Rating Index

A "good service" is a service that a customer can find, understand, and use without having to ask for help.

The Good Service Scorecard table below consists of the 15 universal attributes of a good service based on Lou Downe's Good Service Assessment Methodology.

Each attribute is rated against the following rating index:

0	1	2	3	4
It is not possible for users to do this	A small minority of users can do this with extreme difficulty or effort	Some users can do this, but it still requires difficulty or effort for most	Most users can do this, but it requires difficulty or effort for some	All users can do this easily and consistently

1.2.   Good Service Scorecard

A Good Service...	Rating	What is your service failing to do for users?
1. Is easy to find	1	Ex-Gracia naming of the service is confusing to the customer. Limited amount of information available on website. The language used to describe service is technical in nature and how to use could be significantly improved.
2. Clearly explains its purpose	1	Some parts of the services are clearly explained with visuals, but most are not. The form contains multiple request options and does not clearly articulate that work should be completed before the application is completed and submitted.
3. Sets the expectations a user has of it	2	Expectations of service are not clearly set. Eligibility criteria not clear. Timelines for review and approval, amount of subsidy available, timeline for payment not stated online.
4. Enables each user to complete the outcome they set out to do	2	Fillable forms must be printed, filled, and mailed in. It is inconvenient and there is no form validation. Form is confusing with multiple subsidies in the same form.

Design / Conceive the Future

- Conduct co-creation sessions (with frontline, management and partners in service design) to re-design service as a designed digital first, customer centred service

- Build a narrative, a day in the life – some way of articulating how things will be different

- Identify potential savings / benefits achievable – use this as a basis to build your understanding of the opportunity and any justification/business case that may be required

- Identify effort and investment required to achieve change

Region of Waterloo

Digital Transformation

Recommendations

Service: Children Services Portal Service

Perry Group Consulting

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Mississauga, ON
L5N 2V3

www.perrygroupconsulting.ca
647-669-9540

Table of Contents

This sounds like a lot of work

"If I had eight hours to chop down a tree, I'd spend six sharpening my axe."
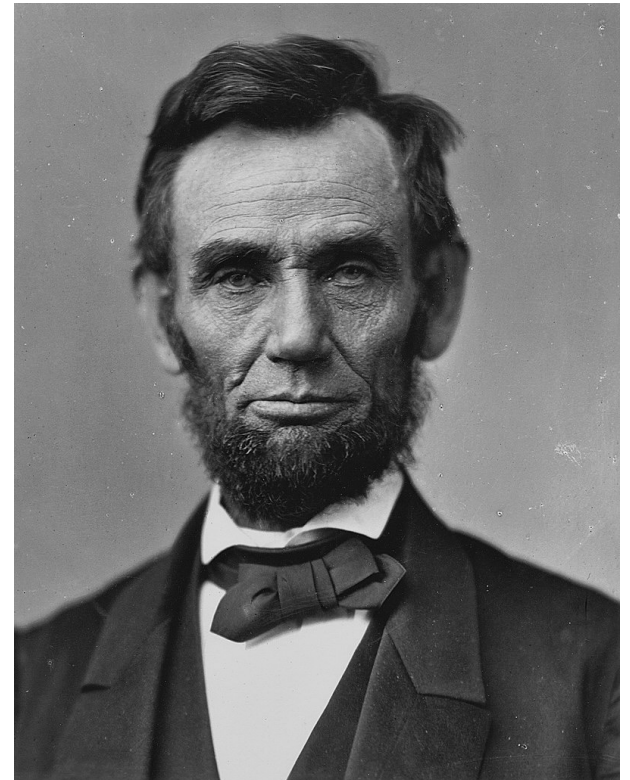
Understand the Impact

- Establish the impact of business process related to each service change
  - What linkages and dependencies does this have to other service areas?
  - Does it impact a single team, multiple teams, division, department or across the organization?

- How can we break this into a **smaller** piece of work, a **smaller** component or deliverable – so that we can
  - Begin sooner
  - Launch a business change sooner
  - Reduce risk
  - Make the change smaller to adopt (staff and customers)
  - Learn as we go

What is needed to Implement?

- Digital Strategy and target Technology Architecture promotes reuse where possible

- So, what will we need?
  - Upgrade of an existing system
  - New modules or add-ons
  - Reconfiguration of an existing system
  - Re-use something we already have / an existing system?
  - Integration/connection of existing system to another
  - Access to existing systems to new people (inside/outside org)
  - New system

- Figure out what is available

Start to Ball Park Investment Levels

- Don't minimize or under-estimate effort and cost – be realistic

- Think about all aspects of effort required for each opportunity
    - How long will it take to implement this change? Will it take a few days, weeks, months or years to complete? How can we make that shorter, simpler?
    - What vendor services will we need
    - How much money is to be invested
    - One year budget or multi-year commitment?
    - Is the investment sustainable? Can it be optimized?

- What resourcing will we need? Internal, secondments, contracts
    - What is the cost of these resources?

- Assess ROI – will this investment pay off within 2, 3, 4, 5 years?

What do you have now ?

- At this stage you should have a clear list of services, opportunities and improvements that you could consider

- Some will be quick wins / some will take larger effort to complete - some will have a small impact to lots of people, some will have a big impact on a small number of people

- Which ones seem like the right ones for you to tackle?

Simple Prioritization

- Prioritize the services / opportunities for transformation

- Use impact vs effort grid for prioritization of service opportunities

- Identify high impact, low effort opportunities for future focus

- Avoid low impact, high effort opportunities until future re-evaluation

Tasks to prioritize

HIGH

IMPACT

LOW

High impact, low effort.

High impact, high effort.

Low impact, low effort.

Low impact, high effort.

LOW **EFFORT** HIGH
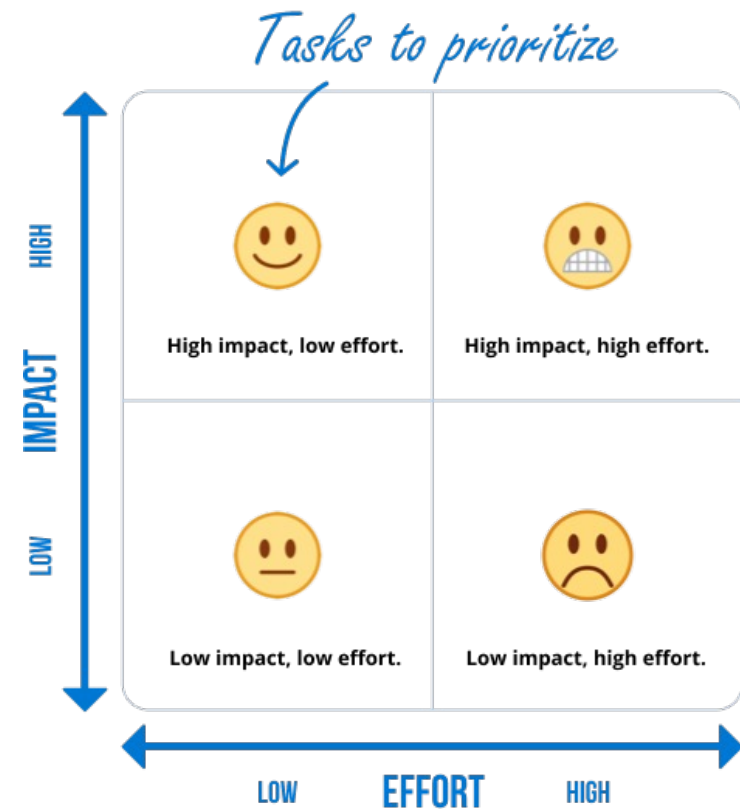
Discussion

Takeaways

Input from citizens, staff, vendor community and lessons learned from other municipalities will help you see how far you can transform your services

To set your own priorities, establish the level of effort required to get to the end state and the benefits

Select those services with less effort and high benefits as the priority ones to transform

Set your Vision, Strategy and Plan

1. Build a Coalition

- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

2. Identify the opportunities

- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
- Identify services, define profile and current performance
- Talk to customers

3. Form a Vision, Identify Initiatives

- Collectively define and communicate how the future will be different from the past and how you will make that future a reality through initiatives linked directly to the vision.
- Identify key initiatives (backlog) + set out strategy

4. Build Buy In and Urgency

- Help others (in your team, across the organization) see the need for change
- Bring everyone up the mountain
- Identify key change agents that will help communicate/sell the change

5. Build the Team

- Dedicate the right resources
- Build a multi-disciplinary team – project lead, analyst, developer
- Co-locate if possible

6. Remove Barriers

- Protect the team
- Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
- Design the future

7. Short Term Wins

- Implement quick, initial wins that form part of the bigger story.
- Launch, learn and improve
- Recognize, communicate and celebrate successes early and often – to energize the team to persist.

8. Sustain Acceleration

- Build momentum
- Press harder after the first successes.
- Be relentless with initiating change after change until the vision is a reality.

9. Embed Change and Iterate

- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

Setting a Vision

- Bring together your coalition, or your whole team

- Share what you've learned and the key opportunities
- Discuss what benefits you aim to achieve
- Talk openly about what the impacts to people will be
- Answer questions and be willing to say "we don't know yet"

- Use "A day in the life" to help your team bring your target state to life
- Work together to develop your elevator pitch

- Build a simple mantra – repeat it at every opportunity

On her way to work, Aisha sees water pooling at the corner of her street, it hasn't rained so it looks a bit odd. Aisha pulls out her smartphone, takes a photo of the scene and uses the City's report a problem feature on its website to notify the City of the problem.

The notification is received, automatically categorized, located, and recorded in the City's customer relationship management system and a request is passed to the work management system for resolution.

The work management system automatically dispatches a request to a crew in the area who receives it on a laptop in their work vehicle. As a potential high priority response, they proceed to the site to inspect the situation. The problem is with a leaking hydrant. Aisha gets an update to let her know that a temporary fix is in place.

On the way home from work, as she passes the corner, Aisha is impressed with the service and feels reassured that the City is working smartly and efficiently.

A few weeks later, a crew visits the site and replaces the faulty part on the hydrant. Aisha receives a notification that the issue has been resolved and is asked to rate her satisfaction with her interaction with the City.

She is pleased with the service and rates it highly.

"Ford says by **mid-2026**, **100%** of its **passenger vehicle range in Europe** will be zero-emissions capable, all-electric or plug-in hybrid; moving to **all-electric by 2030**"

Better Yet … Set a Target

- All our business processes will be managed in Amanda by 2024
- 100% of our inspections will be completed digitally by Q3 2023
- 75% of customer payments will be digital by 2024
- 80% of our inspections will be booked online by the end of 2023
- We will offer complete Digital Planning services by the end of 2025
- All files will be digitized, and we will no longer use paper in our processes by 2026

Link to Broader Strategy

- If you can, link, align, or build your digital targets, plans into:

  - Departmental Business Plan
  - Master Plans
  - Corporate Strategic Plan
  - Digital Strategy

Roadmap

Develop a multi-year plan

- Plan your digital transformation over a few years (about 2 - 3 years)

- You are aiming to build a good enough plan – early work is well defined while the following years will be more generally defined to be refined as you get closer – just enough information to help you understand what the journey will look like, and communicate to key players

- For the initial stages (first year) try to focus on "low effort, high impact" transformations with realistic outcomes – build momentum, learn from experience

- Sequence dependent services and activities appropriately

- Ensure you work with other departments / partners / stakeholders to build your plan

- Carefully consider:
  - How quickly should I go about the change – pace of change?
  - Is the organization ready to change fast?
  - What does the resource availability look like?

Roadmap
Develop a multi-year plan

- Remember:
  - Break things into smaller components and work on things that are doable / achievable – think about the smallest thing that you can do to test or prove an idea
  - Consider building momentum by implementing and releasing real, tangible, but small things (deliberately boil the frog)
  - Think of the flow of work –
    assign activities and work to teams one at a time
  - Use Kanban to
    help enforce the discipline of working on one thing at a time

Kanban

To do	5	In progress	1	Done	6
Launch online booking for bulky pickup		Launch when's my garbage being picked up - garbage truck location checker		Improve web copy for bulky good bookings	
Web copy for fall leaf pickup program				Launch check my garbage day	
Implement "Alexa" what garbage bin should i put this in?				Launch get alerts about garbage day	
Add video to Garbage Trucks				Enhance address search	
Promote Facebook marketplace for re-use items				Improve web copy about collection day best practices	
				Add GPS to Garbage Trucks	

This is your Change

- This is **<u>not</u>** happening to you

- This is your transformation – you need to lead it

- You need to resource it

- Your partners do too (but they won't if you are unwilling to commit your own resources)

Impacts of Resource Commitments

- You should assign your best people to designing the future

- Secondments work well – w/ contracted backfill – because you get to keep the knowledge when they "rollback" to their full-time role

- Taking someone off the production line to setup the new production line **is** disruptive

- But you must accept that this will have an impact and you may need to accept reduced service levels / responsiveness during implementation – this is an investment in future capability

Explore Funding Options

- Build the clear business case – investment < value

- Reallocate funds (lean, process improvement, audit, service reviews)
- Reserves and other budget sources (e.g. gas tax – asset management, permit reserve – building and planning)
- Budget process / business planning – IT Governance
  - Work with IT team to build proposal / business case
- External grants, and other levels of government funding
- Temporary fee adjustments to cover implementation costs
- Service surcharges to cover implementation costs

Fund Teams not Projects

- A fully digital approach sees organizations fund teams and set them to work on problems / opportunities

- Consider: Keeping a digital transformation team together and move them between opportunities / service improvements

- Allows them to develop digital transformation muscles

- This is significantly different to funding projects

- Often quite challenging for municipalities / finance / councils to understand or be willing to commit to

Secure Funding & Resource Commitment

- Establish budgetary and resource requirement by initiative and by year and obtain approval

- Remember - how can you start small?

- Adjust the roadmap to address funding requirements as needed

- Consider funding dedicated project teams over its life

Setup Measures of Success

- Establish baselines (current performance levels) and clear outcomes and success measurements for projects (for each service)
  - What are the performance indicators today and their measurements?
  - What is the realistic achievable target after the change to help us measure success?
  - Consider internal process efficiencies and benefit to citizen including experience

- Digital uptake, customer satisfaction, time spent on admin tasks, error rates, cost per transaction

What measures would make sense in your service area?

What does faster, better, cheaper mean for you?

Build Buy In and Urgency

1. Build a Coalition
- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

2. Identify the opportunities
- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
- Identify services, define profile and current performance
- Talk to customers

3. Form a Vision, Identify Initiatives
- Collectively define & communicate how the future will be different from the past & how to make that future a reality through initiatives linked to the vision
- Identify key initiatives (backlog) + set out strategy
- Secure funding & resources (if needed)

4. Build Buy In and Urgency
- Help others (in your team, across the organization) see the need for change
- Bring everyone up the mountain
- Identify key change agents that will help communicate/sell the change

5. Build the Team
- Dedicate the right resources
- Build a multi-disciplinary team – project lead, analyst, developer
- Co-locate if possible

6. Remove Barriers
- Protect the team
- Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
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7. Short Term Wins
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- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

Involve and Engage

- Involve the users of the systems / services (frontline staff / customers) in as-is and to-be design sessions, involve staff in user interviews

- Work in the open – be transparent about the work / initiatives (no hidden agendas)

- Seek volunteers to participate as change champions on your initiatives

Change Management

- Is about landing the change/transformation that you want to land – as the Service Owner

- Ensuring that the change is designed to meet your vision

- Ensuring that change is not undermined by people and behaviours that are not aligned with the vision

- It's not about placating staff or softening the change to make it acceptable to staff

- Change management must start early

Communicate, Communicate, Communicate

- Around your vision, develop a communication plan
  - Identify all the stakeholders
  - The channels to connect to stakeholders
  - The timing of key communications
  - The message

- Use your mantra, your day in the life repeat it at every opportunity
  - Why is this important for us, why do we need to do it now?
  - What will it mean for us?
  - How will it impact us?
  - Who does this benefit, and how?

What sort of Changes to Expect?

- People / Management & Staff
  - Role changes (large and small)
  - Retraining for new skills / capabilities
  - New expectations of staff (digitally savvy, capable, comfortable with tech and data) – this may require changes to job descriptions and hiring practices
  - Help customers use new digital tools, troubleshooting new tech
  - New accountability for doing work in real time
  - New visibility into (data about) individuals' activities, workloads, routes, performance
  - Working across departments / divisions / teams
  - Others???

What sort of Changes to Expect?

- Process
  - Customers may be entering data into systems – repetitive data entry tasks reduced, but data may still require validation
  - Current tasks/activities may be eliminated/automated (e.g. AI based road patrol)
  - Deferring tasks / decisions to computers, that staff previously made
  - Staff may be expected to record things / do things in systems that they have not before
  - Staff may be expected to record things in real time that previously they batched for later
  - Staff may be expected to interpret data / analyze data
  - Processes may change more frequently (continuous improvement) – change readiness
  - Others???

What sort of Changes to Expect?

- Technology
  - Management and staff will be using technology more in situations where previously they may have relied on paper
  - Using technology in real time (in a meeting, to answer customer inquiries, to answer a committee/council question)
  - Using new technology in new settings (e.g. field staff, service agents, AI in vehicles)
  - Using different technology than they might use today – GIS, business intelligence, scheduling tools, AI
  - Others???

Takeaways

- It is important to set direction on digital transformation
- Use the prioritized opportunities to assess funding requirements and approval
- Develop a transformation roadmap (2- years)
- Communicate the roadmap
- Plan to manage change

Reflect and Recap

1. Build a Coalition

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Following our journey, so far we have:

- Built a service inventory
- Identified current digital and digitization maturity
- Scanned the environment (municipalities and vendors)
- Collected service data
- Identified priorities for transformation
- Co-developed a vision and target
- Built a workplan
- Sought funding and resourcing
- Worked on building buy-in

We are ready to execute on some initiatives … next time we'll talk about how to do that …

1 thing you learned

1 takeaway

1 thing you want to know / want to learn that we haven't talked about yet?

Final Takeaways

- Understand your starting point – Establish a baseline for your services
- Scan the landscape – learn from other municipalities and the industry; listen to citizens and your staff to get feedback on these services
- Identify opportunities – identify and prioritize opportunities for change
- Strategy and Planning – set direction for your business transformation and develop a roadmap considering your resources and priorities
- Get organized – establish the service owner as the leader of the digital transformation, use PM best practice
- Bring the right people (partners, staff) with you – up the mountain

We'll have a course evaluation at the end of the course, but we'd love some initial feedback now if you have time.

http://www.perrygroupconsulting.ca//damidpoint

Digital For Municipal Leaders
Other Modules

- **Module C: Design and Deliver**
  - How to build the right team.
  - How to employ design thinking to design complete services.
  - How to use important tools and techniques such as Good Services, Digital Standards, Business Process Optimization, User Research, Customer Journey Mapping, Service Design
  - How to use the "Discovery – Alpha – Beta – Launch" approach to focus on designing and launching services.
  - How to promote digital service adoption / uptake.
  - How to listen and learn from users.

- **Module D: Operate and Iterate**
  - How to adopt a product mindset to continuous improvement of services.
  - How to measure and track outcomes.
  - How to promote uptake of digital services.
  - Open discussion, next steps and making your personal commitment.

Digital Transformation Barriers

- What barriers to Digital Transformation do you see?

- What mitigations or tactics could we use to tackle these barriers?