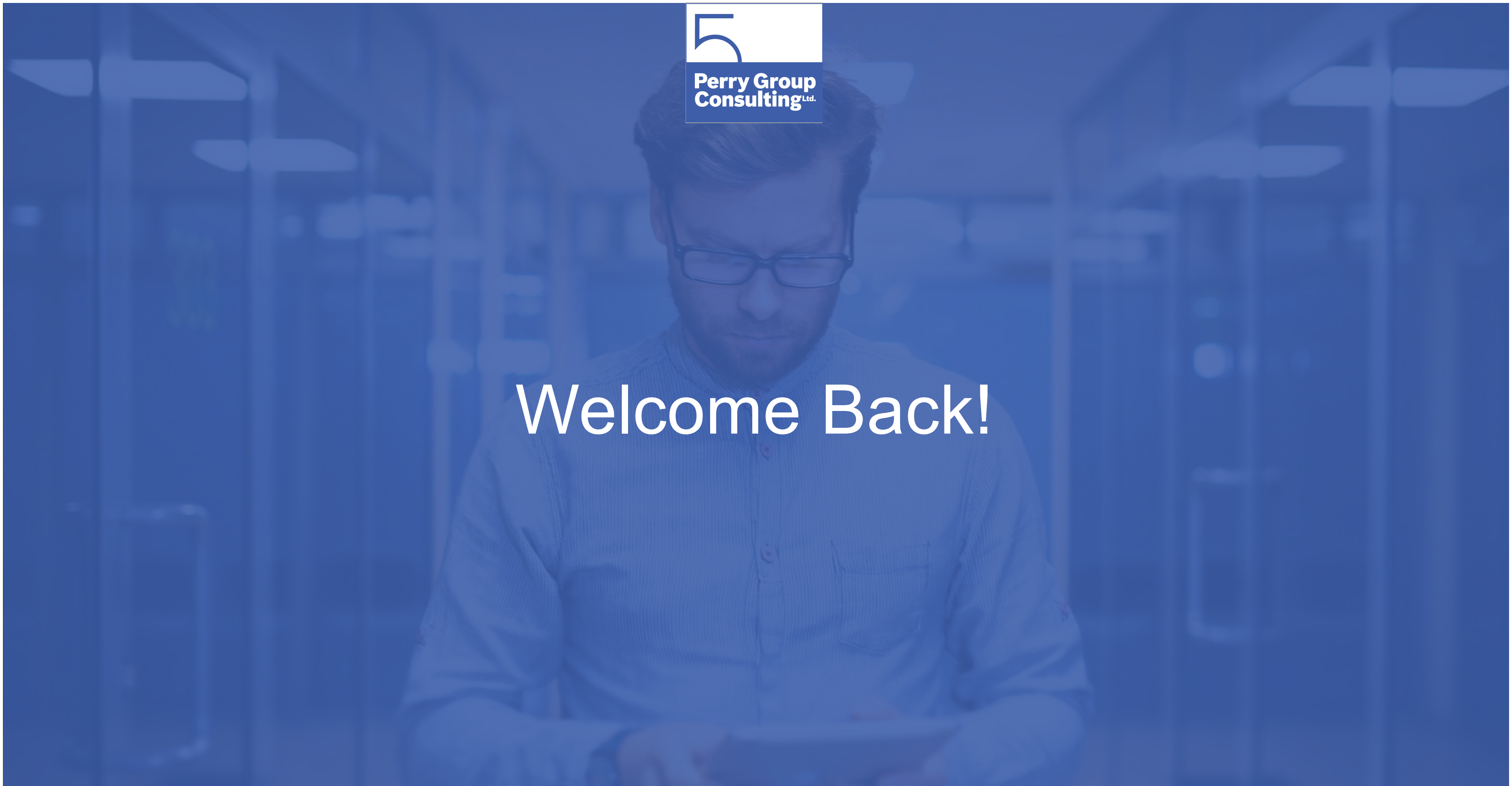
Intro to Digital

For Municipal Leaders

Module D: Operate and Iterate

Perry Group Consulting Ltd.



Perry Group Consulting Ltd.

Welcome Back!

Last session today, thanks for spending time with us!

Logistics

- Less to cover today – some more space to breath and more discussions
- 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

Key Takeaways – Module B

- 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

Key Takeaways – Module C

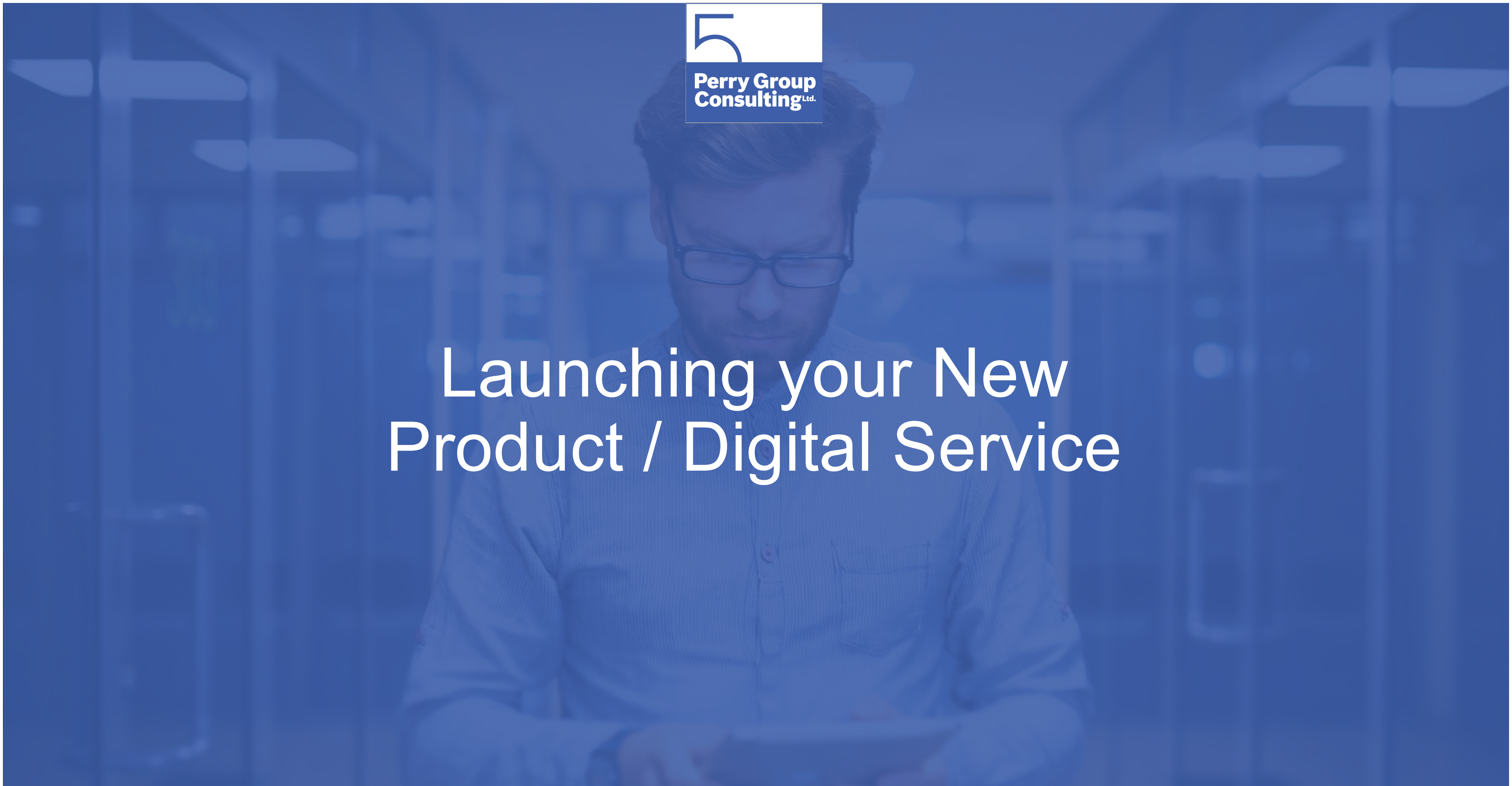
- Service Owner as product owner/leader
- Build the right multi-disciplinary team – don't skimp on resources
- Protect and empower the team
- Establish the right project governance
- Use a project methodology – Agile if possible
- Use the Digital Service Standard as a guideline
- Use Journey Mapping, BPO
- Have a plan to actively manage change

Module D – Operate and Iterate

- Launching
- Promoting
- Iterating and Improving using Product Management Techniques

- Putting it Together
  - Practical Advice – how to incorporate into your daily work
  - TBay's IT and Digital Governance Model

- The Digital Declaration
- Your Personal Digital Commitment



Launching your New Product / Digital Service

Live

- Live begins when the service has reached a point of maturity and all the main features in the backlog have been built.

- While most people understand the purpose of live, it’s not always given the attention and resources it deserves.

Communicating Your Launch

- Launch quietly – test performance, watch people use the product, get feedback, (e.g. beta)
- When you formally launch your product, you want to promote it in a compelling way to people who need it.
- You can promote your product or service digitally through the City website, social media, email newsletters, news media.
- Depending on your target audience you may want to consider signage, flyers, postcards, or other creative ways to get the word out.

Supporting Your Launch

- Make sure your product or service is easy for people to find and get help if they have questions.
- Your service is part of continuum of discovery – the service needs to be integrated into your web content / website as part of clear journey. Don’t just slap a button on and be done.
- When you first launch your product, make sure you are available to help answer questions or troubleshoot any issues that arise.
  - Friday at 5 p.m. usually isn’t the best time to launch if you can help it 😉

& go
buy, send, pay
stamps · letters · parcels · uk and abroad · packaging
buy, send, pay
stamps · letters · parcels · uk and abroad · packaging
post & go
post & go
Travel Money
Currency Deals
post box

Ongoing Promotion of Digital Services

- Your Goal is to promote uptake
  - Target 80% for C2G, 100% for B2G transactions

- Various tactics available:
  - Press releases / media
  - Add information to forms – “you can fill this online at thunderbay.ca/
  - Branding on forms, materials, signs, vehicles
  - Inserts into mailers
  - Active staff promotion – front desk staff / call centre agents – “did you know …”
  - Reach out to big service users – e.g. high volume users
  - Messaging/workshops to user communities
  - Advertise on your own website, and on Google AdWords

Using Incentives

- Create clear and tangible incentives
- Can be both positive (discounts, rewards, free add-on services) and negative (longer times, higher price)

- Examples
  - Charge less for online services - passing on lower costs where fees are based on cost recovery (e.g. London $10 price reduction for online building permits)
  - Process digital applications faster
  - Allow later/extended deadlines for online transactions
  - Enter digital users into prize draws

Nudge Theory

- Nudge theory – a branch of behavioral science
- Choice Architecture – designing choices to influence behaviours, encourage the right behaviours
- Examples of nudges include
  - Sending someone a reminder to schedule a doctor's appointment
  - Ensuring that healthier food is more noticeable in a cafeteria
  - Providing people with information regarding how much water they use
  - Putting up No Littering signs warning of fines vs. improving the availability and visibility of litter bins
  - Low-cost interventions in the wording of Tax collection letters
    - UK – simple changes to reminder letters to late income tax payers
    - Guatemala – one of the lowest tax compliance in the world

Table 1. Summary of messages in the letters to promote tax compliance in Guatemala

Group	Description
Control group	No letter
Original Letter (reminder message)	Simple reminder to declare, but no information on how to declare.
Behavioral Design Letter	Including information on where to declare, possibility of paying in installments, and a deterrent message: "If you do not declare, you may be audited and face the procedure established by law."
Behavioral design + **Social Norm Letter**	"According to our records, 64.5 percent of Guatemalans declared their income tax for the year 2013 on time. You are part of the minority of Guatemalans who are yet to declare for this tax."
Behavioral design + **Deliberate Choice Letter**	"Previously we have considered your failure to declare an oversight. However, if you don't declare now, we will consider it an active choice and you may therefore be audited and could face the procedure established by law."
Behavioral Design + **National Pride Letter**	"You are a Guatemalan citizen and Guatemala needs you. Be a good citizen and submit the 2013 annual return of income tax... Are you going to support your country? "

- Those that received letters highlighted above paid four times more in taxes relative to those that received the original letter.

Exercise

Promoting Adoption / Uptake

- What sort of activities and nudges could you use to promote uptake of your digital services?


THIS IS CANADA'S
MOST
POPULAR
FOOD TRUCK
UNFORTUNATELY
58% OF FOOD
PRODUCED IN
CANADA GETS
THROWN OUT
A 340150

🎉🎉 Congratulations

You now have a live **product**

Monitoring and Measuring Performance

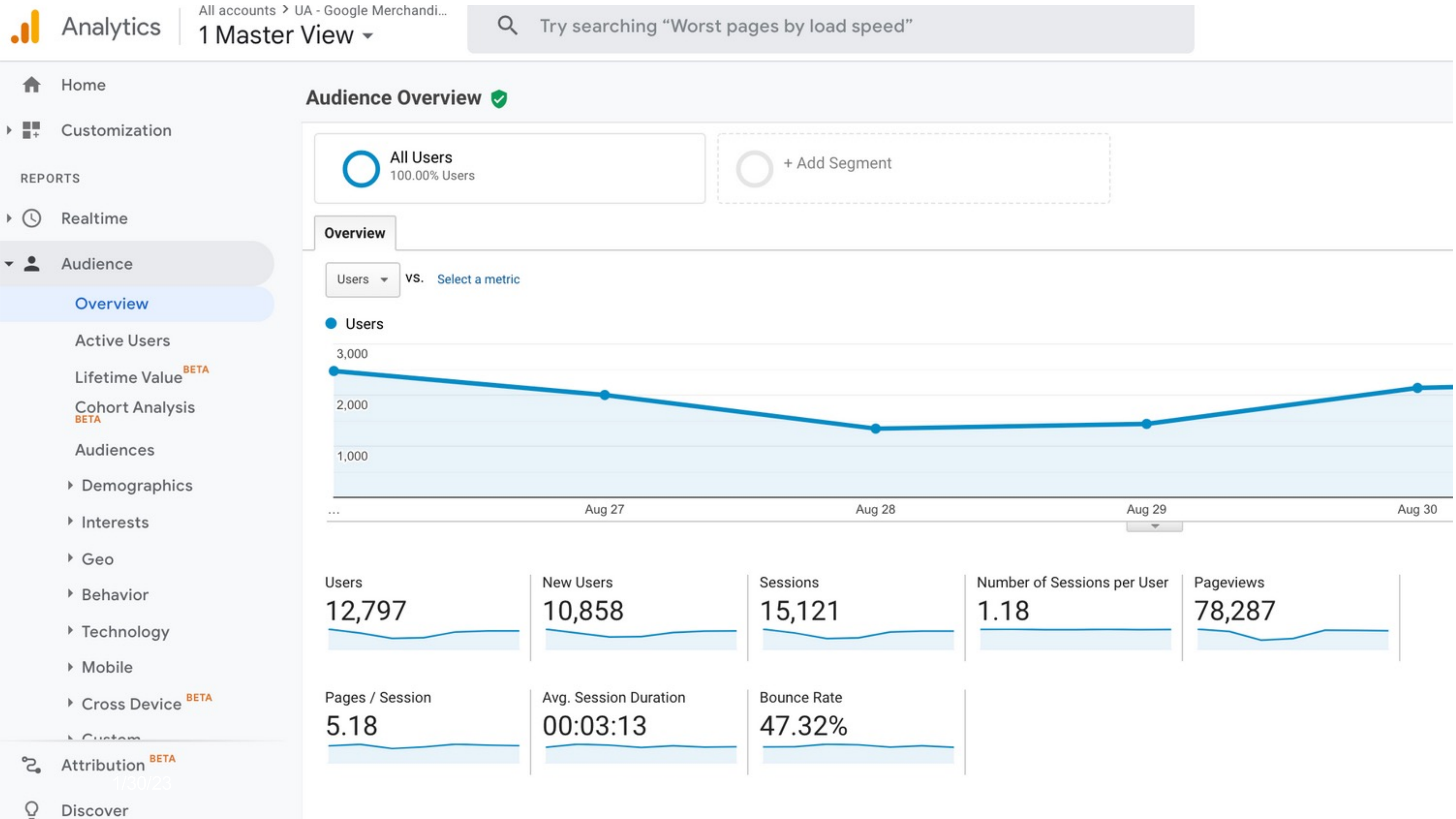
In Live we

- monitor and track the status of the service and key performance indicators
- conduct ongoing user research and usability testing every three to four months
- continue building features from the backlog and releasing improvements to the service
- communicate and celebrate the successes of the service
- ensure the service continues to meet the Digital Service Standard

- Live is not “keeping the lights on” – it’s about continuous improvement

“What gets measured gets improved.” - Robert Sharma


Google Analytics


Analytics
All accounts > UA - Google Merchandi...
1 Master View
Try searching "Worst pages by load speed"
Home
Customization
REPORTS
Realtime
Audience
Overview
Active Users
Lifetime Value BETA
Cohort Analysis BETA
Audiences
Demographics
Interests
Geo
Behavior
Technology
Mobile
Cross Device BETA
Attribution BETA
Discover
Audience Overview
All Users
100.00% Users
+ Add Segment
Overview
Users
vs.
Select a metric
Users
3,000
2,000
1,000
Aug 27
Aug 28
Aug 29
Aug 30
Users
12,797
New Users
10,858
Sessions
15,121
Number of Sessions per User
1.18
Pageviews
78,287
Pages / Session
5.18
Avg. Session Duration
00:03:13
Bounce Rate
47.32%

UK Government

Mandatory publishing of performance data

You must publish data about the performance of your service, and add it to data.gov.uk.

You must publish data on the 4 mandatory key performance indicators (KPIs), which are:

- cost per transaction
- user satisfaction
- completion rate
- digital take-up

Digital Take-Up

You should plan to continually increase digital take-up.

Digital take-up is the percentage of people using government services online in relation to other channels, for example paper or telephone.

Calculating digital take-up

You must measure digital take-up from public beta onwards.

To calculate digital take-up, follow these steps:

1. Find the number of completed digital transactions over any fixed period (include digital transactions where assisted digital support was used).
2. Divide that number by the total number of transactions from all channels in the same period.
3. Show the result as a percentage.

Completion Rate

You should monitor your service's completion rate.

Your service's completion rate is the number of digital transactions that your users complete as a percentage of all digital transactions that your users start.

Calculating completion rate

To calculate your completion rate:

1. Count the number of completed transactions - the numerator.
2. Divide it by the total number of transactions (including partially completed or failed ones) - the denominator.
3. Show the result as a percentage.

Make sure you count only genuine users, ie set up your analytics tools to exclude internal users, test users and web robots from your data.

User Satisfaction

You should offer users the ability to provide feedback, including open ended commentary – which should be reviewed regularly.

Use during Alpha, Beta and Live stages

Add to footer and when people drop out of your service.


Home

Give feedback on Register a boat

Satisfaction survey

Overall, how did you feel about the service you received today?

Very satisfied
Satisfied
Neither satisfied or dissatisfied
Dissatisfied
Very dissatisfied

How could we improve this service?

Do not include any personal or financial information, for example your National Insurance or credit card numbers.

You have 1200 characters remaining

Send feedback

Cost Per Transaction

The cost to government each time someone completes the task your service provides is known as 'cost per transaction'.

Calculating your service's cost per transaction allows you to:
•measure how cost-efficient your service is
•use your results to change the service and make it more cost-efficient

Calculating cost per transaction

Do the following to calculate cost per transaction:

1. Work out the total cost of providing the service - including assisted digital support costs - through all channels.
2. Divide it by the total number of completed transactions.

Because your cost per transaction calculation includes all channels, you can use it to predict how much you'll save by moving a higher proportion of people to digital channels.

Other considerations re: Metrics

- Make sure data is accurate

- Use segments in your analysis
  - Device type (phone, desktop)
  - New vs. repeat user
  - Demographics

- Measure over time
  - Affect of changes to service
  - Impact of communication / promotion
  - Seasonal variations

- Compare to other services you offer, or your peers offer

Product Management

"Traditionally, government has been very good at declaring success at the end of a project even if 'success' just means 'done.' **Instead, we need to get better at iterating and improving the product as we go along so that 'success' means measurably adding value to our mission.**

Jim Schutz
City Manager

SAN RAFAEL
THE CITY WITH A MISSION

Product Management is how companies create things that people want to use, love using, and seek out over their competitors

Products Evolve


LinkedIn
Your network is bigger than you think
Welcome, Chris | Sign Out
Connections Network Requests Profile Search
Your Network
Members in network: 12
Top industries:
Internet (80%)
Computer Software (20%)
Top regions:
San Francisco Bay Area (100%)
Job seekers: 2
Contractors: 2
Deal makers: 6
Average number of connections: 11
Most connections: 12
Explore your Network
Grow your Network
Action Items
Invite Connections
New connections means a more powerful network — and better resources for you and everyone you invite. Invite connections now!
You have 12 connections.
New connections this week: Anna Bruce
12
Update your Profile
Write a short introduction about yourself — add comments about your professional expertise.
Finding contract positions
Most contractors will be found by hiring managers, instead of seeking them out. The most important factor there is completing your profile. You can also search for hiring managers now.
No longer looking for a contract position? Adjust your profile.
Welcome to your Network
LinkedIn is about finding people for projects or collaboration, and helping your connections do the same. LinkedIn makes your network more efficient, letting you keep in touch with the people you know and find the people you don't, but who are only a step away.
As LinkedIn grows, we'll let you know how LinkedIn is being used here on your home page. Welcome!
Your Account | Privacy Policy | User Agreement | Customer Service/FAQ
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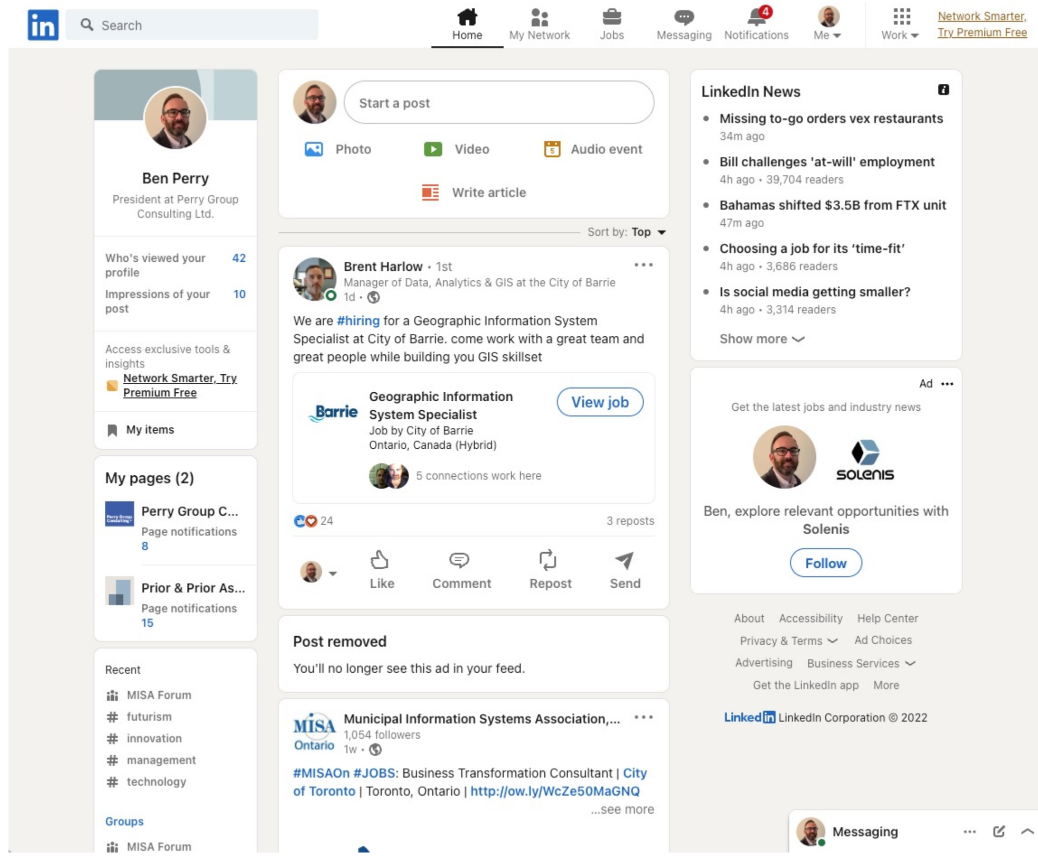
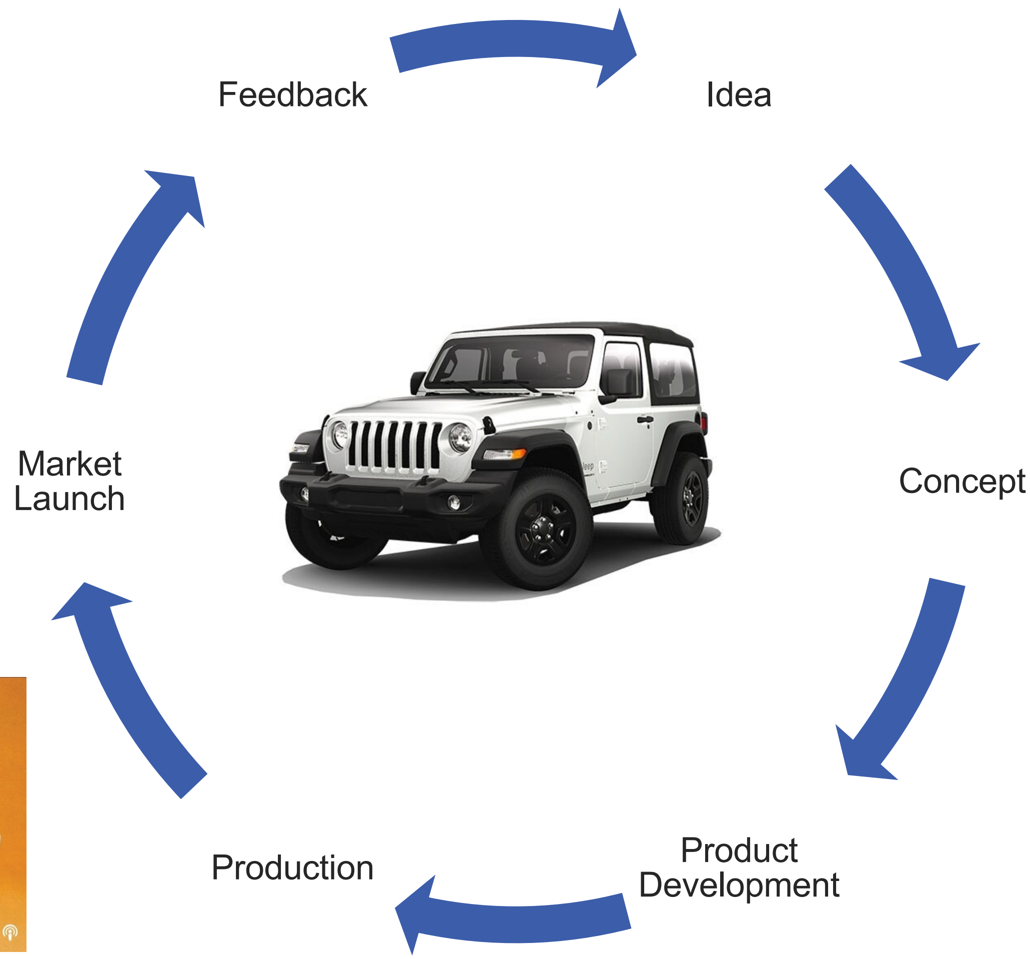
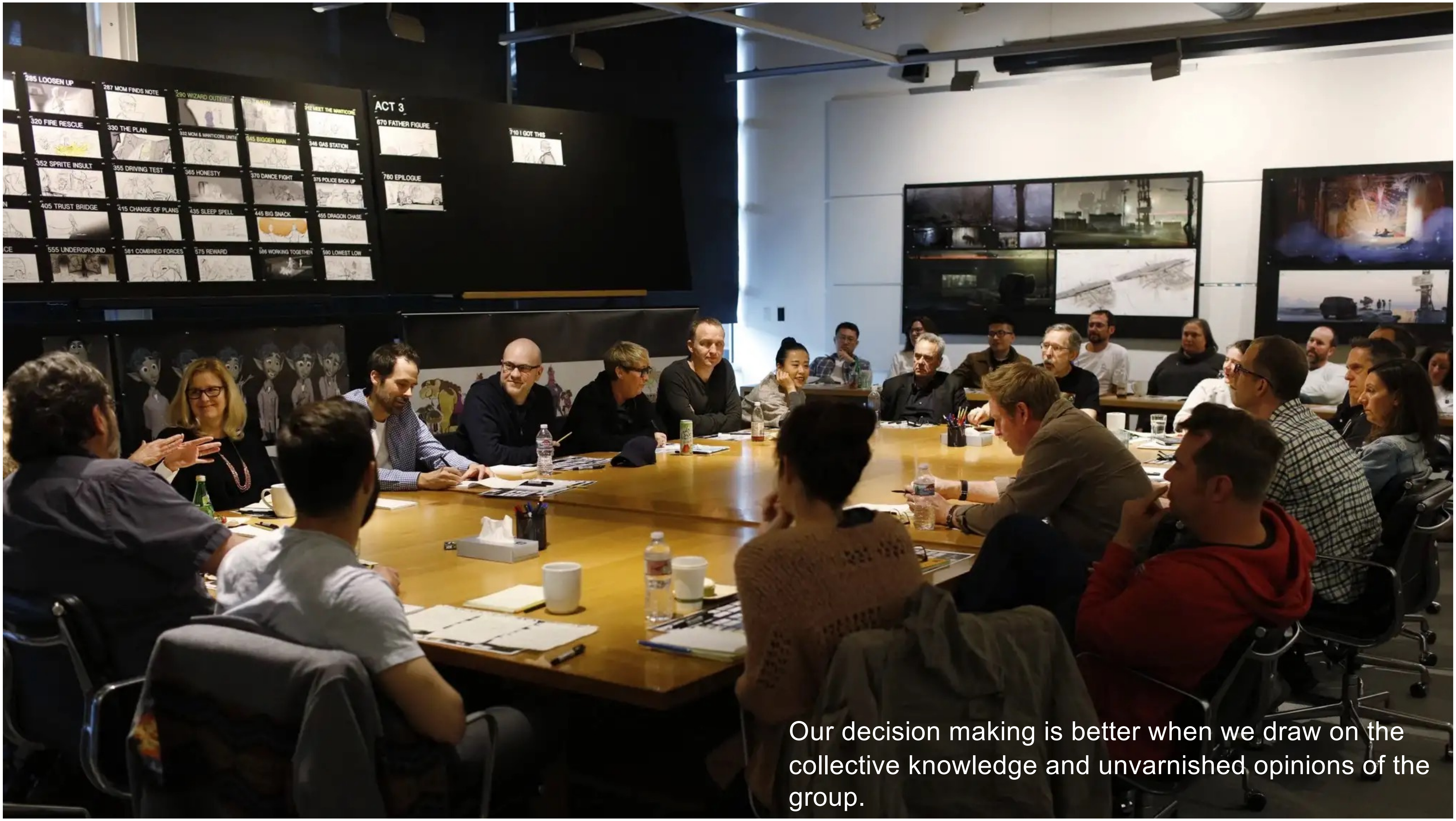

Search
Home
My Network
Jobs
Messaging
Notifications
Me
Work
Network Smarter, Try Premium Free
Ben Perry
President at Perry Group Consulting Ltd.
Who's viewed your profile 42
Impressions of your post 10
Access exclusive tools & insights
Network Smarter, Try Premium Free
My items
My pages (2)
Perry Group C...
Page notifications 8
Prior & Prior As...
Page notifications 15
Recent
MISA Forum
futurism
innovation
management
technology
Groups
MISA Forum
Start a post
Photo
Video
Audio event
Write article
Sort by: Top
Brent Harlow • 1st
Manager of Data, Analytics & GIS at the City of Barrie
1d
We are #hiring for a Geographic Information System Specialist at City of Barrie. come work with a great team and great people while building you GIS skillset
Barrie
Geographic Information System Specialist
Job by City of Barrie
Ontario, Canada (Hybrid)
View job
5 connections work here
24
3 reposts
Like
Comment
Repost
Send
Post removed
You'll no longer see this ad in your feed.
Municipal Information Systems Association,...
1,054 followers
1w
#MISAOn #JOBS: Business Transformation Consultant | City of Toronto | Toronto, Ontario | http://ow.ly/WcZe50MaGNQ
...see more
LinkedIn News
Missing to-go orders vex restaurants
34m ago
Bill challenges 'at-will' employment
4h ago • 39,704 readers
Bahamas shifted $3.5B from FTX unit
47m ago
Choosing a job for its 'time-fit'
4h ago • 3,686 readers
Is social media getting smaller?
4h ago • 3,314 readers
Show more
Ad
Get the latest jobs and industry news
solenis
Ben, explore relevant opportunities with Solenis
Follow
About Accessibility Help Center
Privacy & Terms Ad Choices
Advertising Business Services
Get the LinkedIn app More
LinkedIn Corporation © 2022
Messaging


All-Terrain T/A
BFGoodrich


BRONCO


Feedback
Idea
Concept
Product Development
Production
Market Launch


BRING BACK BRONCO
THE UNTOLD STORY



Our decision making is better when we draw on the collective knowledge and unvarnished opinions of the group.

Product vs. Project Delivery

Product Management vs. Project Management

A **product** can be a service, process, report, policy, web application or website that satisfies the needs of a group of users. It goes through a life cycle, being developed and introduced on the market, grown and improved upon, and retired once it's no longer needed.

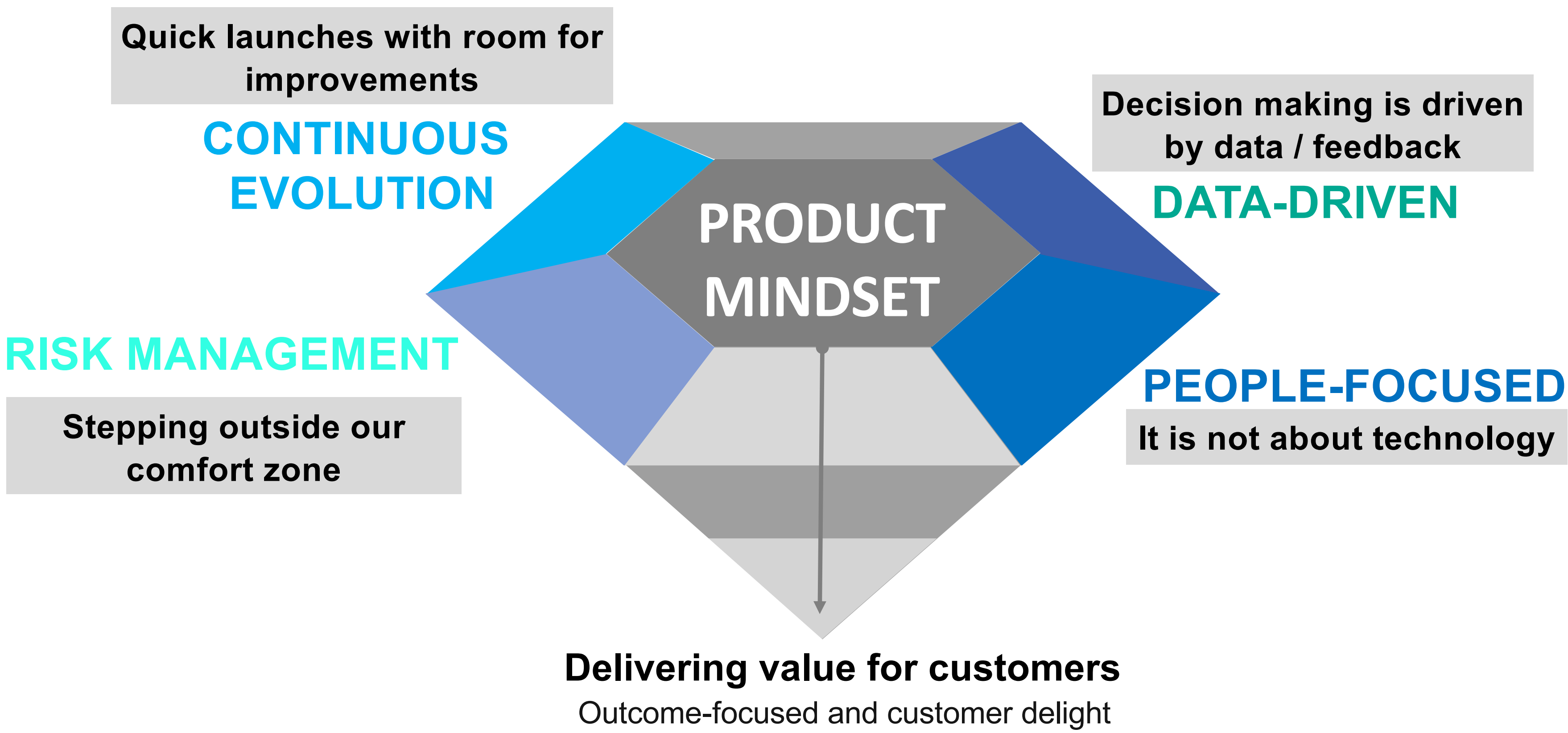
A **project** is a one-at-a-time endeavour with the goal of creating a product. It has a start and end date, as well as a defined outcome.

Product (Strategic)

- Talk to users to gather info and requirements
- Identify problems and opportunities
- Define features
- Know when a product is ready to move from alpha to beta testing
- Know when to kill a product

Project (Tactical)

- Develop project timeline
- Spot and minimize issues early
- Assign tasks and deadlines
- Manage task lists, materials, reports, and people to provide project team with their needs
- Bring project to completion


Quick launches with room for improvements
CONTINUOUS EVOLUTION
Decision making is driven by data / feedback
DATA-DRIVEN
PRODUCT MINDSET
RISK MANAGEMENT
Stepping outside our comfort zone
PEOPLE-FOCUSED
It is not about technology
Delivering value for customers
Outcome-focused and customer delight

Product Ownership

- Product Owner = Service Owner
  - Acts like an Entrepreneur / like a 'mini-CEO'
  - ‘Owns' the product – its performance today and the vision for the future
  - Customer Ambasssador
  - Constantly striving for improvements – because services are never "finished".

Be Curious

Key Product Questions for Product Owners

- How can I increase digital adoption?
- How can I make onboarding easier for users?
- Are users using all the features of the service?
- How can I make the experience better?
- How can I reduce errors?
- Are there specific segments of users that need something different / better?
- How satisfied are users? How can I increase satisfaction?
- What features are we missing?
- How can I get better feedback?
- What should be next on our roadmap?
- What is the data telling us? What data are we not collecting that we need to?
- Do users continue to use our service?

Understand what users need

- Set up processes and methods to collect and analyse inputs
  - Review metrics / analytics
  - Review user feedback forms
  - Talk to users / conduct interviews
  - Conduct usability testing
  - Talk to frontline staff / setup a Teams Channel for internal discussion
  - Suggest an idea / feature / feature improvement – allow voting on feature improvements
  - Prototype / mockup ideas and potential solutions

- Turn these into features / small work packages (remember to make small as you can)

- Someone must be responsible for this

Build and Test Hypotheses

Managing with data

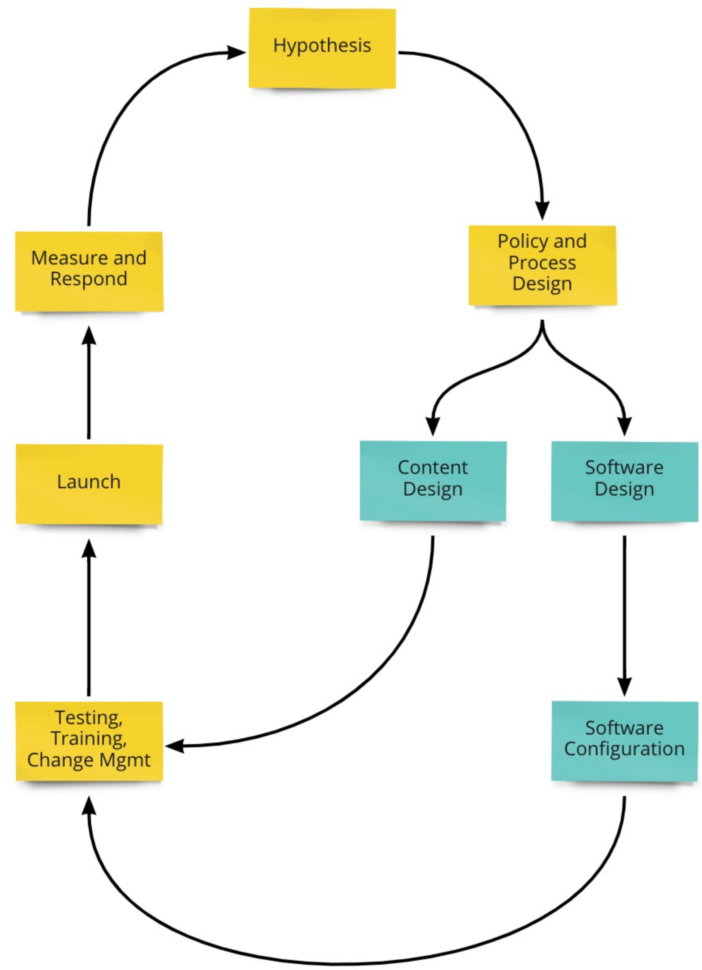
- Build hypotheses:
  - “Doing/changing [something] …
  - “Will [benefit] …
  - “Because [assumption/logic/strategy]

- “If we provide an online form, it will speed up the application process because digital applications are quicker than paper ones.”

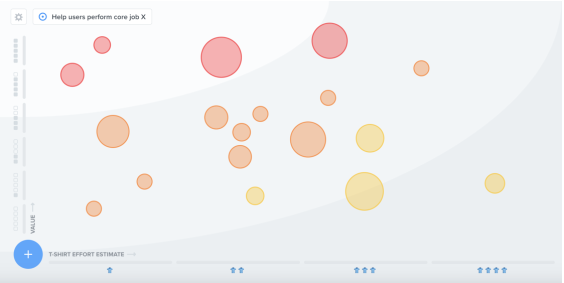
- “We will measure how long it takes a user to make an application using the online form we build.”

Constant Cycle

- Continuous Improvement
- Digitization creates new opportunity



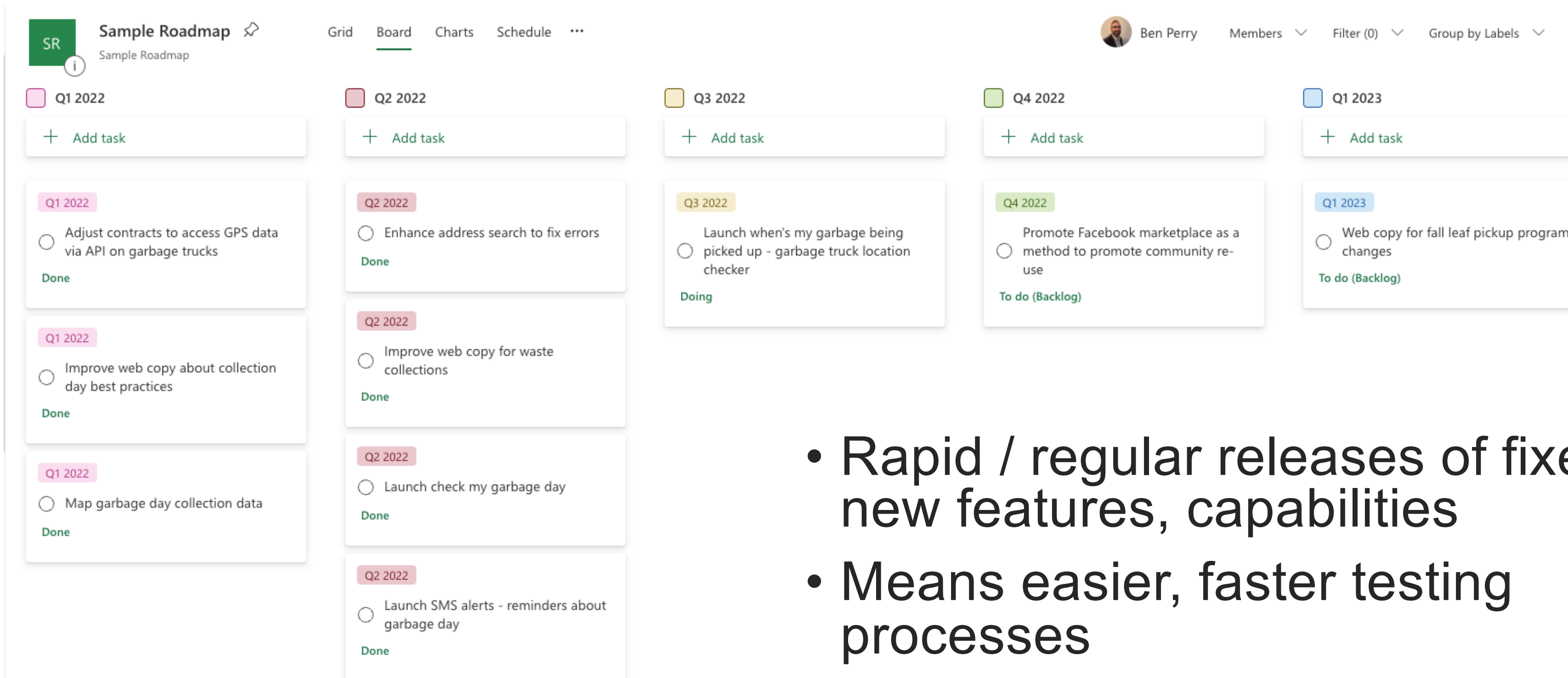
Prioritize / build roadmap



- Various methods available – pick one and keep it simple
  - Value vs. Complexity
  - Effort vs. Impact
  - ICE – Impact, Confidence, Ease
  - RICE – Reach, Impact, Confidence, Effort
  - MoSCoW (Must have, Should have, Could have, Won’t have)
  - Weighted Factors

- Remember, it’s only a tool to help assess relative merits (not to be the definitive answer) – you will still have decisions to make

Build a Roadmap



- Rapid / regular releases of fixes, new features, capabilities
- Means easier, faster testing processes

Putting it all Together
Practical Suggestions

Overwhelming Amount of Information

Concepts and Techniques

- 5 Why's
- Avoiding Fake Digital
- Compounding Benefits – Building on Previous
- Defining Services
- Service Ownership
- Collaboration – Building your Coalition
- Environmental Scan – Looking & Learning from Leaders
- Service Inventory
- Basic Digital Maturity Assessment
- Service Prioritization
- Talking to Customers – Journey Mapping
- Talking to your Team
- Business Process Optimization
- Service Design
- Digital Architecture
- Estimating Project Size / Effort
- Budget and Funding
- Prioritization
- Change Management Planning and Execution
- Day in the Life
- Digital Architecture
- Service Patterns
- Good Services
- Design Approach – Discovery, Alpha, Beta, Live
- Digital Service Standard
- Service Owner
- DRI
- Agile
- Kanban, Sprints, Retrospectives
- Product Management

How to Put into Practice

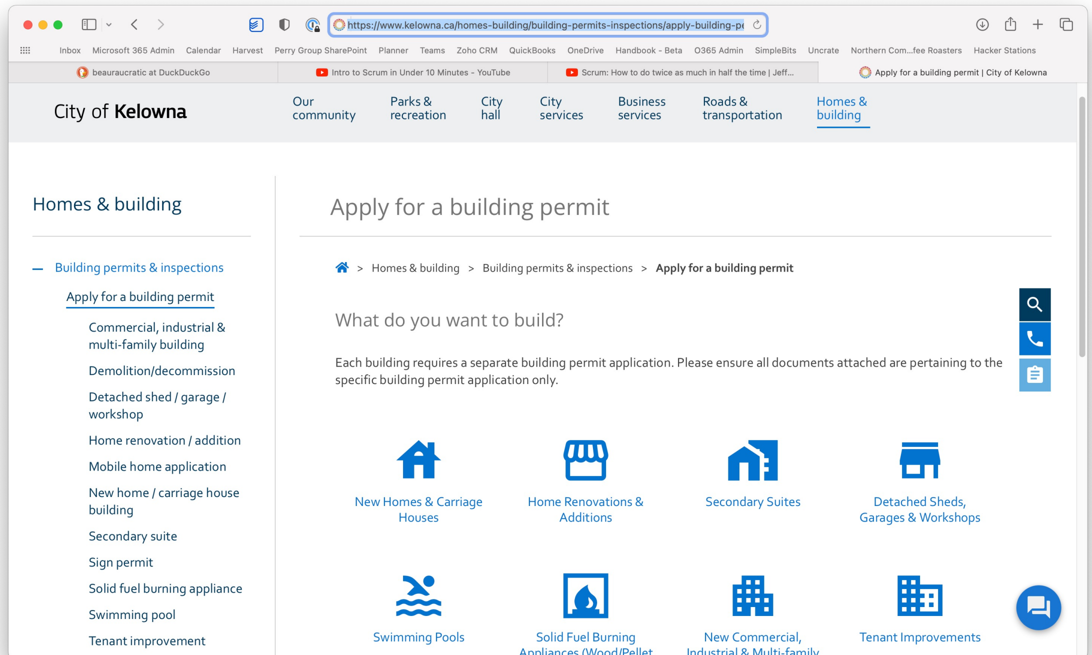
Simple Web Improvements

Remember Give information is a digital service

- Small changes to web content can have a big impact. Perfect opportunity to:
  - Make small changes and measure impacts
  - Good opportunity to compare with leaders in your space
- Look at your web analytics – (work with your web team) – what is it telling you?
  - What are your highest trafficked pages for your service areas?
  - What devices are they using to access your site? When do they access? Where are visitors coming from?
  - Where are people leaving the site?
- Talk to staff – what are the things that customers call about that we could put on the web?
  - Could you make information more prominent on the web?
- Are there things that your customers have to contact you to get – that they could self serve (e.g. forms, guides, etc.) that would reduce pressure on back office?
- Look at your most important services
  - Do you have all the info online
  - Is content aligned around the things that customers are looking to do?
- Solve for the 80% - doesn't have to be perfect, doesn't have to handle every exception

Simple Web Improvements

- Improve web copy – make it easier to read (hemingwayapp.com)
- Post additional information, where there are gaps
- Refactor content to be more contextual to customer needs



https://www.kelowna.ca/homes-building/building-permits-inspections/apply-building-permit

Inflight Projects

Things you can do that Cost Nothing but your Time

- Involve partners, if you haven't already - do it now
- Check your governance - do you have the right people in the room - better to fix now than not
- Involve staff, if you haven't already
- If you haven't already, talk to customers
- Work openly / communicate about the work you are doing - blog, send a weekly email, post a message on Teams, on a bulletin board
- Make sure you have clear roles and responsibilities and a clear understanding of the DRI / service owner responsibility and accountability
- Are you going to meet the service standards (testing for accessibility, launching on thunderbay.ca, etc.) – revisit these standards and align your work if possible
- Are there change management activities (preparing your team or customers) that you should/could do now?
- Could you launch in beta – would that be helpful?
- Think about how you will evolve the product – post launch

Future Opportunities

Things you can do that Cost Nothing but your Time

- Think Digital First, and think services, not systems
- Researching a project?
  - Look around at leaders – talk to them – learn what to do and what not to do – dig below the surface
  - Involve partners and staff – bring them up the mountain too
- Build a rough Service Inventory - remembering perfect is enemy of good
  - Use MSL as a starting point, ask all your managers and supervisors to list the service offerings you have and what customers want to do. Cross reference, build into a spreadsheet and maintain.
  - We think you will find value in this in many ways (performance management, future planning, business continuity, etc.)
- Build your coalition – think about who needs to be inside the tent
- Run your own BPO (group brainstorms) – understand current and potential future state
- Run your own customer interviews
- Work this into an idea/concept with your IT contact – for review (small items won't likely need formal 'approval')

Things to Build into New Projects

Budget for the complete Project Cost – Don’t Start on the Wrong Foot

- Collaboration (governance, etc.)
- Consider using vendor / consulting assistance to set roadmap - or assign internal time to do that yourselves with your team / partners
- Break the work into smaller components / deliverables – avoid big bang
- Budget for BPO
  - 1 x BPO, including some customer interviews and journey mapping = ~ $5k
- Budget for internal project management (IT or dept), contract in for project management or engage external project advisory services ($25k – 50k)
- Vendor implementation services
  - Estimate at minimum using 100% of the product cost - its rough, but good enough as a starting point
- Work with partners to understand their resource needs (IT, Finance, Privacy, etc.)
- Budget to backfill staff - so you can release your best people onto the project
  - For estimating – use $100k per person, per annum as a rough level
  - Recognize that seconding and backfilling with someone without the experience, expertise is likely to mean a lower level of service - be OK / live with that
- How will you run change management?

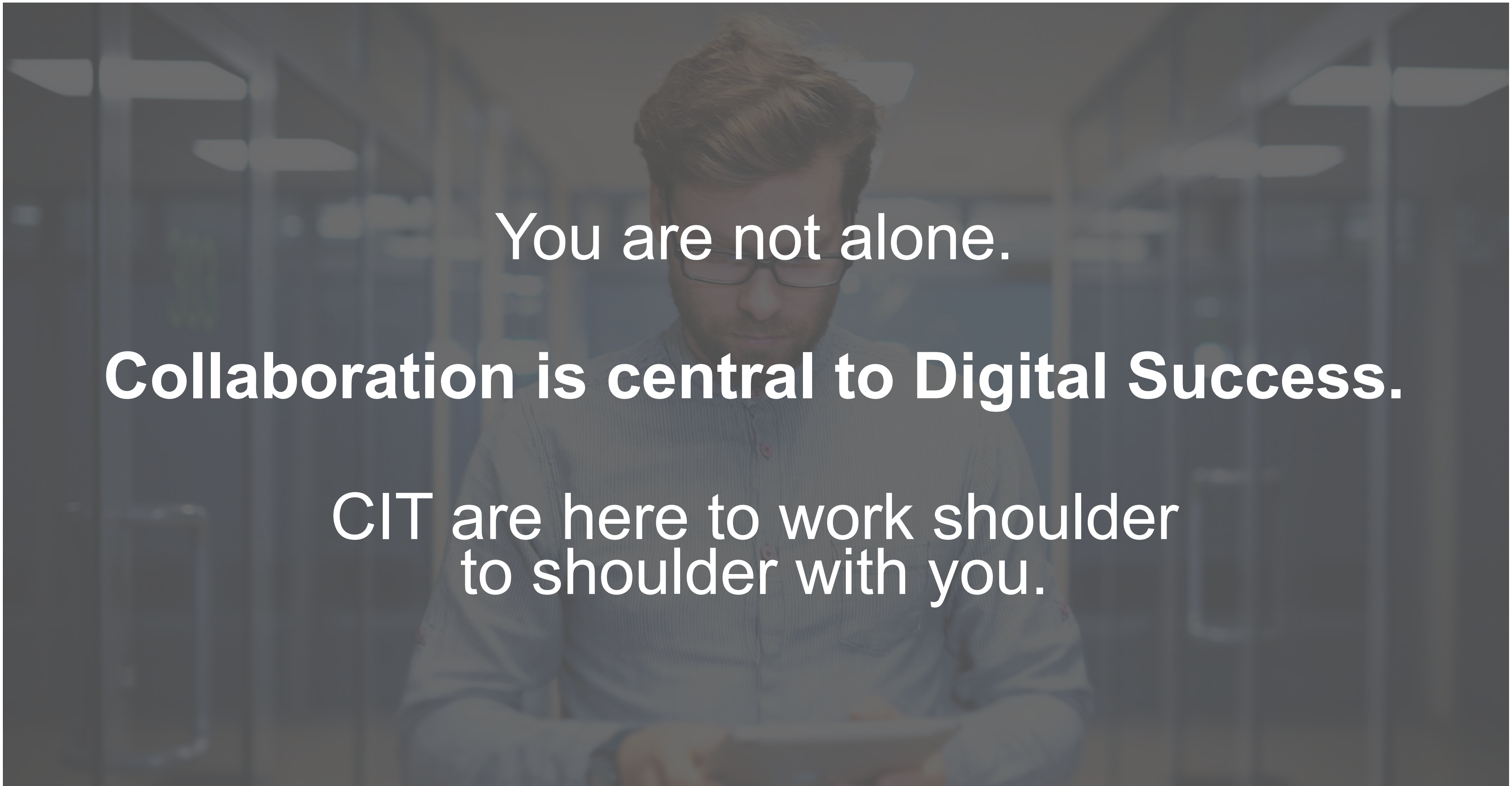
I am Buying a System

How does this apply to me?

- Partner with the right people (governance, resourcing, intake, budget)
- Business process first – do some rethinking early on in preparation for changes
- Be willing to “give up” your business processes for better processes that are built on best practice that achieve the same ends / value / due diligence

- Be ready to resource the **project** suitably – PM, SME’s, Application Specialists, etc.
- Have a plan for resourcing the **product** on an ongoing basis (CIT / service owner partnership)

- Avoid big bang, break your implementation project into smaller pieces (phases, launches) where possible – agile, compounding benefits
- Look to the vendor to help you deliver in an iterative way (build into RFP)
- Change management from the start



You are not alone.

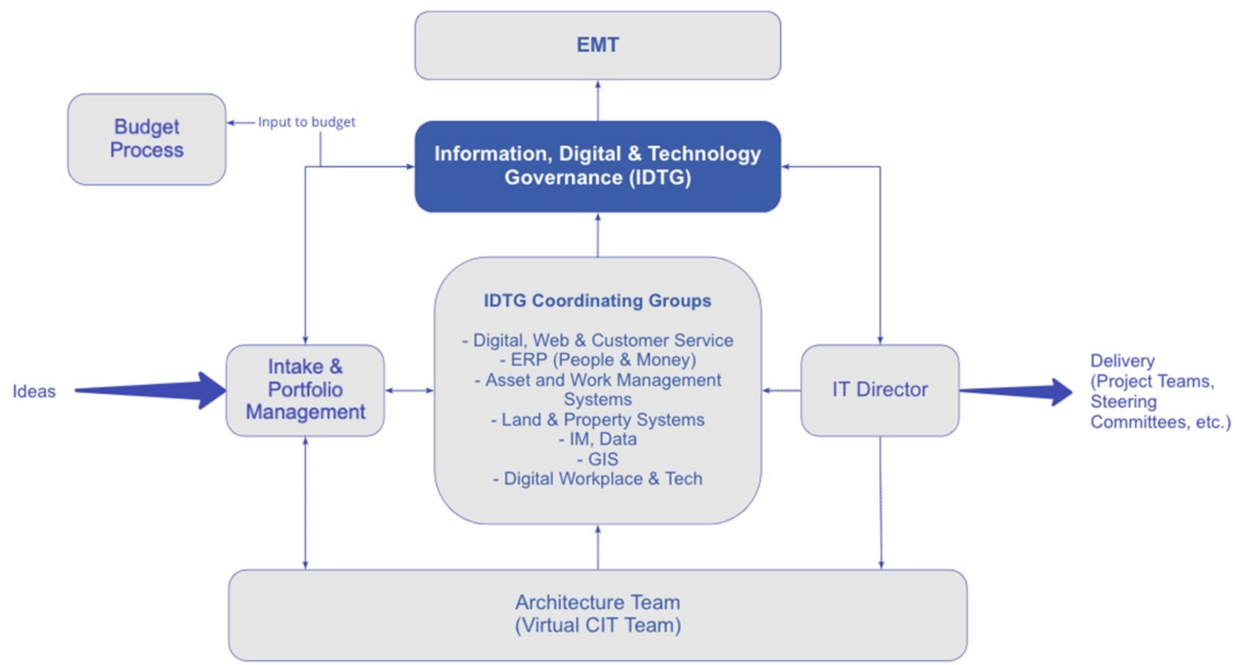
Collaboration is central to Digital Success.

CIT are here to work shoulder to shoulder with you.

Perry Group Consulting Ltd.

Digital Strategy
Intake and Prioritization

Information, Digital & Technology Governance (IDTG)



Why Intake / Prioritization?

Hint: There is more work than we can handle

- Governance Model identifies importance of Technical and Digital Investment and Prioritization
  - Decisions about how much and where to invest in technology and digital initiatives, including project approvals and justification techniques.
  - The intake and prioritization processes helps justify the work undertaken on digital and IT initiatives.

- Intake is about evaluation – ‘should we be doing this?’
  - Applies criteria to separate projects from change and service requests, then to evaluate whether the opportunity makes sense.

- Prioritization is about establishing sequence and urgency – ‘we’d like to do this, but we have limited capacity’
  - Applies criteria to establish scoring on identified projects.
  - Not all projects are prioritized – based on size, whether or not discretionary, timing.
  - Prioritization is a repeated exercise to cover a certain period of time.
  - Work based on groupings. Not just the highest score.

Technology Work Types

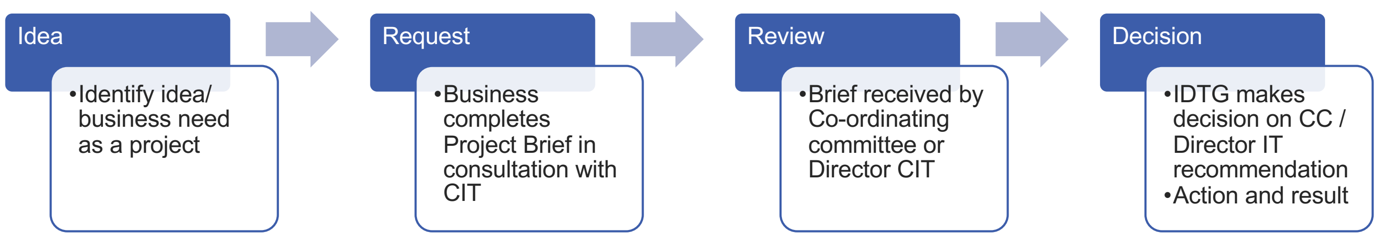
Intake Process

Service Request	Change Request	Project Request
• Outage/Helpdesk call • New User • User access request • New device • Replacement Device	• Minor configuration change • New report • New network location • Regular software update	• New software module • New software system • PC deployment • Election Support • System replacement

Increasing effort, size, and complexity

Project Requests - Intake

- Completed for requests identified as projects
- Completed by the **business unit in consultation with CIT**
- Gathers basic information to start the conversation
- Request Briefs logged and results shared
- Initial assessment with CIT Project/Business Analyst, then submitted for review by IDTG Co-ordinating Committees or to Director CIT for recommendation to the IDTG.



City of Thunder Bay
Technology Project Brief

Project Information		
Project Name	Provide a project title.	
Description	Provide a description of the initiative.	
Business Need	Describe the business need that the initiative is addressing.	
Resources Required	Identify who will need to be involved in the project.	
Time Estimate	How long will the project take? When does the project need to begin?	
Budget and Cost Estimate	What is the estimated cost of the project? How will the project be funded? If applicable, what is the anticipated ROI?	
Other Comments/Information	Any other information pertinent for consideration.	
Prioritization Details and Score		
Organizational Risk	Refers to the risks to the organization in general. Consider organizational, financial, reputational, risks, etc. Balance probability of the risk happening as well as its impact.	
Digital Alignment	How does the project align with corporate goals and objectives relative to the digital strategy? How will the project improve how services are delivered?	
Business Impact	How will the delivery of the project have a positive impact on the department making the request?	
Community Impact	What kind of impact would the community experience? Generally, this should be from a direct impact to how they experience services delivered by the City.	
Urgency	What is the speed at which the solution is required? Are there time constraints?	
Prioritization Score		
Review & Prepared by	Who has been consulted in the review and preparation of this project request?	
Decision and Next Steps	Result of reviews and approvals. Next steps required.	
Date Finalized	Date that review and prioritization was finalized	

CIT's IT Delivery Team will work with requestor to collect all data required to complete the brief. Effort will depend on research & investigation needed and project complexity.

Note: this is not a project plan but rather data needed to determine estimated cost, effort and value in order to provide a prioritization score to determine if/when a project will proceed.

Selection and Prioritization

- Provides an objective approach, using a multifactor set of criteria
- Allows for consistent project comparison and a ranked project list
- Identifies high/medium/low priorities
- Helps to ensure work that is urgent receives appropriate attention
- Helps communicate urgency to organization

This process is new and it's likely to require some changes along the way.

It's important….

- To start somewhere
- Align with corporate budget and selection processes
- Establish rules for applying the process
- Understand what to do with exceptions (such as non-discretionary projects)

Selection and Prioritization Criteria

Criteria	Low Score: 2	Medium Score: 4	High Score: 7	Critical Score: 10
Organizational Risk: Refers to the risks to the organization in general. Consider organizational, financial, reputational risks, etc.. Balance probability of the risk happening as well as its impact.	Little or no risk to the organization if the project is not done. Low risk probability and reasonably easily managed if the risk came to pass.	Some risk, but generally manageable risks that would not create any significant issues if it came to pass. Some probability that the risk would come to pass.	A significant probability that the risk would happen and/or challenging to manage if it did happen.	Risk has been confirmed and action must be taken. Risk is significant in nature.
Digital Alignment: How does the project align with corporate goals and objectives relative to the digital strategy? How will the project improve how services are delivered?	There is limited alignment to the digital strategy or corporate goals and objectives.	The project will address a component of the digital strategy.	The project will address a significant aspect of the digital strategy and is in alignment with corporate goals and objectives.	Critical to completion of a key component of the digital strategy as set out by IDTG.
Business Impact: How will the delivery of the project have a positive impact on the department making the request? If applicable, factor in the impact of the ROI for this project.	Little or no impact to the business directly.	Would help a substantial number of people within the business to generally be more efficient, saving time and effort.	Help a most/all staff in the business be more efficient saving significant amounts of time and effort that could be redeployed to other areas.	Crucial to business for service continuity.
Community Impact: What kind of impact would the community experience? Generally, this should be from a direct impact to how they experience services delivered by the City.	Little to no direct impact to the residents and community. Impact for a narrow group of users.	Some impact to a portion of the community from the delivery of the project. Usually for multiple special interest groups, a few Wards, etc.	Impacts most or all residents or a significant portion of the community. Would have a transformative impact on how service is delivered.	Essential service to all residents or a significant portion of the community.
Urgency: What is the speed at which the solution is required? Are there time constraints?	Little or no time constraints.	Some expectation that the solution be in place in the next 1-2 years.	Significant expectation or need to be implemented for current capital year.	Required completion during the current capital year.

Prioritization - Additional Considerations

- **Not all projects need to be prioritized by IDTG**
    - Non-discretionary projects - some CIT projects just need to be done
    - Discretionary projects (projects <$50k, <10 – 15 day effort)
    - Out of scope for planning period – but will need to be reviewed and approved

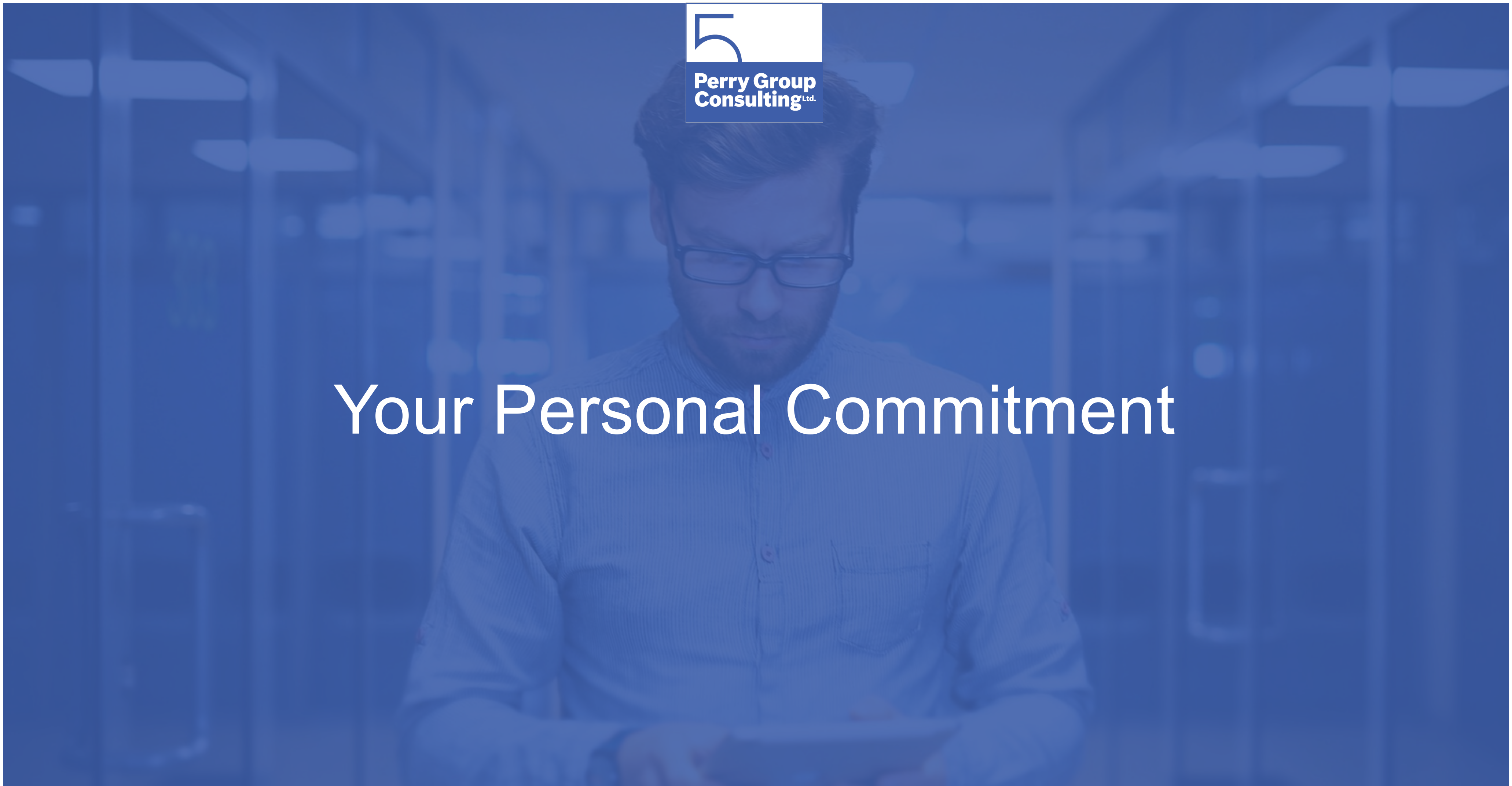
- IT capacity limits the ability to conduct projects - operations usually account for 65-70% of staff time
- Business Unit capacity limits ability to conduct projects. **Collaborative effort needed for success.**
- Look at prioritization for groupings (high/medium/low) not individual number

Project Request Cycle

- In Cycle requests – align with CTB Capital Budget submissions timelines
    - Currently funding requests are developed in May/June/July based on funding envelopes that are received.
    - This creates 2 key prioritization points:
        - Preliminary prioritization – in alignment with request submission, focus on identifying priorities relative to corporate strategy and forecast resources ($, people)
        - Secondary prioritization – once funding approval received, focus on scheduling projects based on priorities and capacity
- Out of Cycle requests
    - Although discouraged, the reality is that some technology needs cannot be anticipated or identified through the annual budget process, nor put off.
    - Follow requirements for intake
    - Identify impact on other projects

Key Takeaways

- All initiatives classified as IT/Digital projects need to go through an intake review process
- Intake / Prioritization Process is designed to ensure collaboration and digital strategy alignment
- All discretionary projects estimated to be over 50k need to go through IDTG prioritization process
- **Non-discretionary projects or projects < 50k < 10-15 effort are selected and prioritized between requesting manager/director and CIT Director**
- **Not sure where to start, who to speak to… just contact the CIT Service Desk and they will get you to the right place.**



Your Personal Commitment

Perry Group Consulting Ltd.

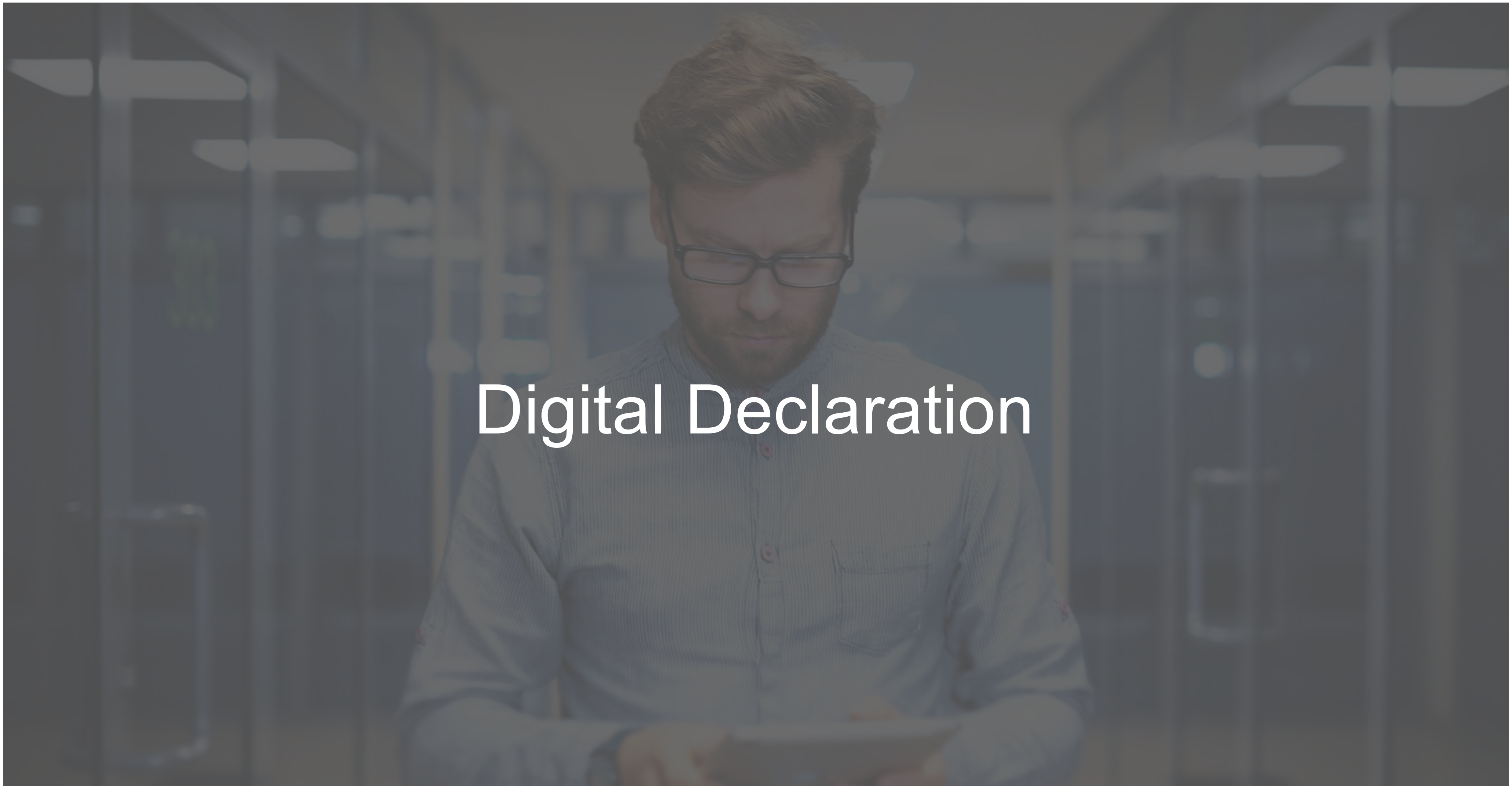
City’s Digital Vision

A collaborative approach to delivering customer-centred, digitally-powered City services.

Supporting Concepts

- That collaboration is at the heart of digital success.
- That City services to the community is the core of what Thunder Bay is about and that “efficient, accessible, easy-to-use, cost-effective and digitally-powered” serves that mission.
- That the City should design its services around customers, not around internal needs, and
- That the City intends to modernize how it delivers services by taking advantage of digital technologies for both internal and customer-facing services.

Digital Declaration



Digital Declaration

The Digital Strategy seeks a digital commitment from Service Owners →

Are you willing to sign off on this declaration?

This declaration affirms the City's ambition for services in the internet age and our commitments to realizing it.

It commits us to working to:

- Offer services as end-to-end digital services that meet the digital service standard.
- Design services to best meet the needs of citizens.
- Protect citizens' privacy and security.
- Deliver value for money.

By signing the declaration, all leaders and service owners at Thunder Bay acknowledge that the City's preferred and expected approach is for services to be delivered digitally, that any new services must be designed Digital First, and that service owners commit to prioritizing the delivery of digital service in their respective areas.

Exercise

Personal Digital Commitment

- What service(s) do you intend/plan to look at?
- What 3-5 concrete actions do you intend to try / do that we've discussed over the past 4 weeks?
- What help do you need?

Ask Us Anything

Thank you

INTRO TO DIGITAL FOR MUNICIPAL LEADERS

This certificate is awarded to

You

For your completion of the Perry Group
Intro to Digital for Municipal Leaders Course

BEN PERRY, President

Wednesday, Feb 1, 2023
DATE