

# Advancing Digital Service Delivery

**Final Report**

September 2021



# Acknowledgment

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The views expressed are those of the Region of Peel and ForwardVu Solutions Inc. and not necessarily the Province of Ontario



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# Executive Summary

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# Executive Summary

## Overview and Objectives

- In February 2021, the Province of Ontario approved funding for the Advancing Digital Service Delivery project through the Audit and Accountability Fund (AAF).
- The objective of this review was to analyze all client-facing services and develop a roadmap of services prioritized for digital modernization. This work advances both Digital Strategy and Service Experience Strategy.
- The Region's end goal is to have a set of recommended solutions that will result in Region of Peel services becoming more efficient and modernized in service delivery while maintaining legislated requirements and excellence in customer service.

## Outcomes and Benefits

- Improved ease of access to Regional services
- Improved service continuity in case in-person service access is not possible
- Cost savings by shifting client inquiries from higher-cost channels (mail, in-person, phone, email) to lower-cost, digital self-service
- Efficiencies in business processes and cutting red-tape to allow employees to focus on higher-value work
- Digitalization roadmap helps prioritize the Region's focus and resources on common objectives
- Increased trust and confidence through improved residence experience and client satisfaction

# Executive Summary

## Current State Assessment

- 105 currently delivered services were identified and assessed regarding their current level as well as the potential for further digitalization, cost savings and efficiencies.
- The review found the current state of digital service delivery to be lagging user expectations, with fewer than one-third of Peel services available digitally.

## Resident Engagement

- Extensive resident engagement was conducted to determine expectations. 692 residents participated in focus groups, journey mapping sessions and a survey. The findings and insights from all resident engagement evolved into the set of themes and recommendations.
- The findings confirmed that **over 50% of users go online first** when they need service or information, and they expect the Region to provide all services digitally.
- Resident consultations formed a critical input when developing the Target Future State service design blueprint.

## Target Future State Definition

- A gap analysis, target future state and recommendations have been developed. These recommendations provided input into the development of initiatives and a modernization roadmap.
- Strengths, issues, opportunities and challenges were identified to ensure a focus on critical success factors is included in the implementation roadmap.
- The service process review and consultations with Region of Peel enterprise architects and technology stakeholders identified application technology gaps and options for improvement and replacement.
- Target future state service processes were developed to digitalize services, improve efficiencies and provide an improved customer experience. These service process changes will result in a significant improvement in customer experience, replace duplicate applications with a core standard application and result in digitalization savings.
- A service blueprint approach will be used to design and update a core set of services that will be used as templates to be applied to similar services.

# Executive Summary

## Roadmap and Implementation Planning

- A three-year Digital Services Roadmap was developed to close the gap between resident expectations and the Region's digital services. Seventeen major initiatives within four workstreams were identified to advance the evolution of these services.
- The Roadmap defines initiatives that will design, digitalize and implement a core set of 27 services over a three-year period. This core set represents the largest opportunities for affecting improvements in efficiencies and customer experience.
- The remaining services will be included for digitalization in subsequent implementation phases.

## Cost Efficiencies and Savings

- The services assessed were categorized by the potential to yield digitalization cost savings either through quantifiable efficiencies or direct savings.
- Analysis focused on the potential to capture service delivery efficiencies and corresponding IT technology asset reductions through optimization efforts.
- The 5-year timeline was chosen to provide a reasonable period to capture savings. The transformative changes put forth in the Roadmap do not come fully in force until after three years.
- When fully implemented, the digitalization efforts should yield approximately \$2,585,094 of recurring efficiency and direct cost savings per year.
- The potential total savings include both direct cost reductions and quantifiable efficiency gains. Over a 5-year period the total savings potential benefit is \$6,731,505.

# Executive Summary

## Critical Success Factors

- A shift from business area-led investment in digital services to an enterprise-wide roadmap with associated governance support and funding is required.
- Executive accountability to set targets and measure performance to reach the desired outcomes.
- A centralized multidisciplinary program team responsible for implementing the Digital Services Roadmap, including all components and interdependencies.
- Business unit commitment to an enterprise approach to designing and delivering digital services, which includes adopting common process standards and replacing department "point solutions" with enterprise-wide core applications where duplicate capabilities exist.
- A flexible, rapid decision-making program governance structure is required to maintain momentum towards desired outcomes and benefits.





# Advancing Digital Service Delivery

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*Focusing on service delivery, resident experience, and modernization opportunities, as well as administrative processes to improve customer experience and reduce costs.*

# Project Overview & Scope

The Region's digital journey has evolved from 2015 to 2020, including the focus of its Digital Strategy with a mandate to "Provide engaging and seamless resident and employee service experiences through sustainable and integrated business and technology modernization."

The Region intends to digitalize services where possible to make the access of information and services easy and effective. Digitalization of services is one way to increase access and have a positive impact on a resident's experience with the Region of Peel, while offering opportunities to identify and achieve efficiencies.

Regional government services like water, waste management, public health programs, paramedic services, social services and affordable housing programs are essential. The COVID-19 global pandemic has brought a sense of urgency for governments to modernize the delivery of critical services to residents.

The Region's end goal, consistent with the Audit and Accountability Fund's objectives, is to have a set of recommended solutions that will result in these services becoming more efficient and modernized in service delivery while maintaining legislated requirements and excellence in customer service.

*The objective of this project is to confirm the programs which would have the greatest impact to modernize today; and to provide recommendations on how best to digitalize services that will have the most impact on residents and offer sound business improvement benefits.*

# Project Objectives, Outcomes & Benefits

## Objectives

- To develop a set of recommended solutions that will result in these services becoming more efficient and modernized in service delivery while maintaining legislated requirements and excellence in customer service
- Confirm the programs which would have the greatest impact to modernize today
- Provide recommendations on how best to digitalize services that will have the most impact on residents and offer sound business improvement benefits

## Outcomes & Benefits

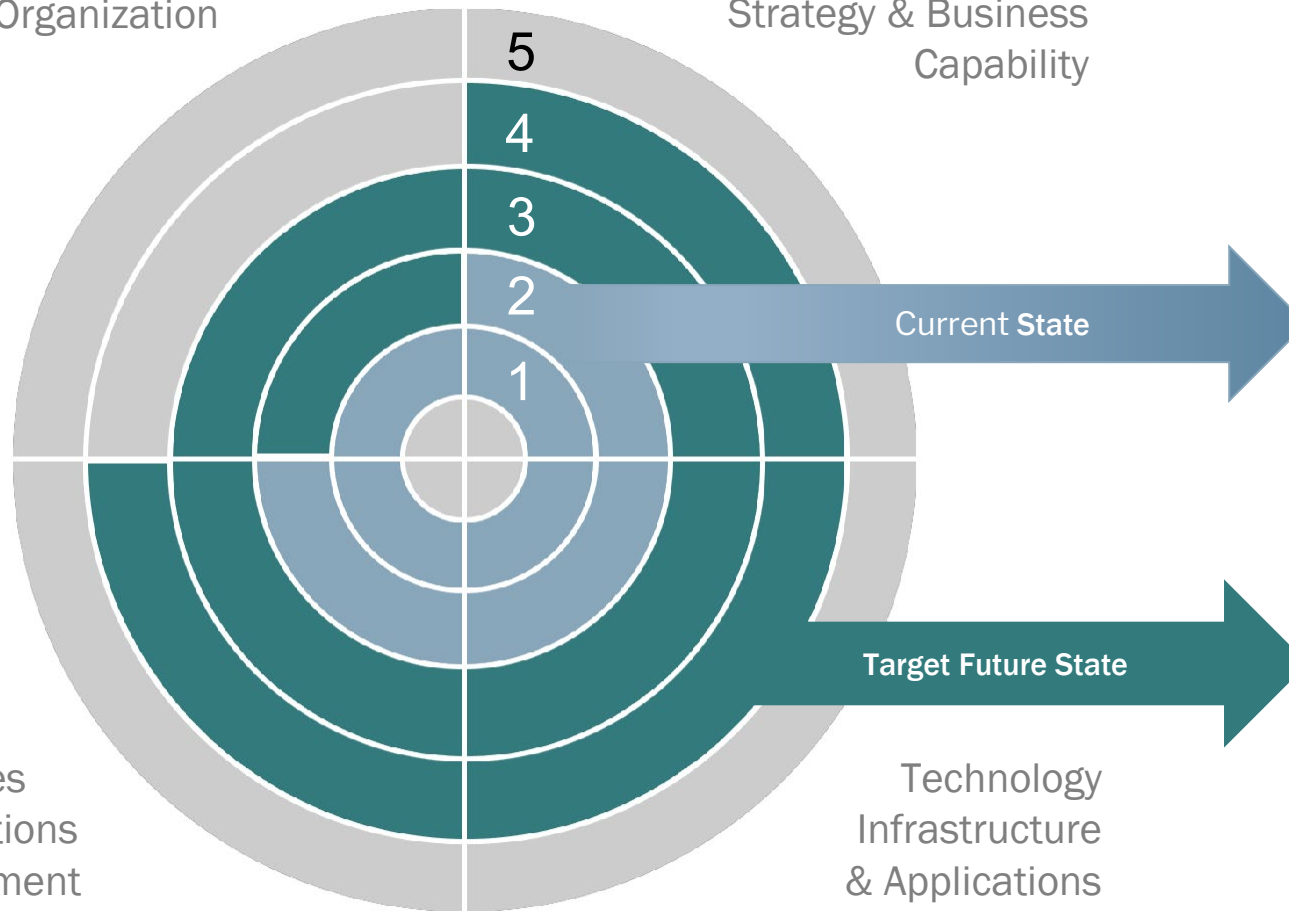
- Improved resident ease of access to Regional services
- Improved service continuity in case in-person service access is not possible
- Cost savings by shifting client inquiries from higher-cost channels (mail, in-person, phone, email) to lower-cost, digital self-service
- Efficiencies in business processes and cutting red-tape to allow employees to focus on higher-value work
- Digitalization roadmap helps prioritize the Region's priorities and resources on common objectives
- Increased trust and confidence through improved resident experience and client satisfaction

# Digital Services Maturity Model

A focus on digitalization will evolve the Region's digital maturity to the Optimizing level. A key enabler in this evolution is the adoption of a Program Governance approach as part of the Digital Services Roadmap.

People & Organization

Strategy & Business  
Capability



Processes  
& Operations  
Management

Technology  
Infrastructure  
& Applications

## Digital services maturity

### 1 – AWARE

Organization exhibits few customer-centric/digital service capabilities.

### 2 – DEVELOPING

Organization that has rudimentary set of customer-centric digital service capabilities.

### 3 – PRACTICING

Organization has implemented basic customer-centric digital service capabilities.

### 4 – OPTIMIZING

Organization has not only developed customer-centric digital capabilities but also actively enables them and supports their development.

### 5 – BEST-IN-CLASS

Organization has evolved services based upon integrated enabling technology and supports digital transformation initiatives.

# Digital Services Vision

## People & Organization

- A multi-stream Program Structure (Maturity Level 3) is initially implemented to provide accelerated focus on the development of the Business Capability, Processes and Operations Management as well as the Technology and Applications areas
- Once the foundational components of Digital Service Delivery are in place, and the Region of Peel has insight as to how their long term organization model can support and optimize their digital vision, a new more permanent structure can evolve

## Strategy & Business Capability

- Advancing Digital Service delivery becomes one of the Region's principle strategic objectives to accrue savings and benefits
- Focus on digital capability and services is initially placed on front-end web-based services and the Peel website is enhanced for resident self-service

## Technology & Applications

- The core applications used to support digital services is reduced and a transition to fewer enabling technology applications is put into place
- Functional microservices will be utilized by the Region to facilitate the rapid development of digitalized services. Microservices support standard service components such as e-signature, e-payment and electronic document submission.

## Processes & Management

- A structured and guided approach to the creation of digital services is put into place and managed by a services unit to ensure consistency of application and approach across the Region
- Standard business process types are built to enable and support rapid development and digitalization of services
- Funding is put into place to encourage the development, maintenance and enhancement of digital services conforming to the digital vision



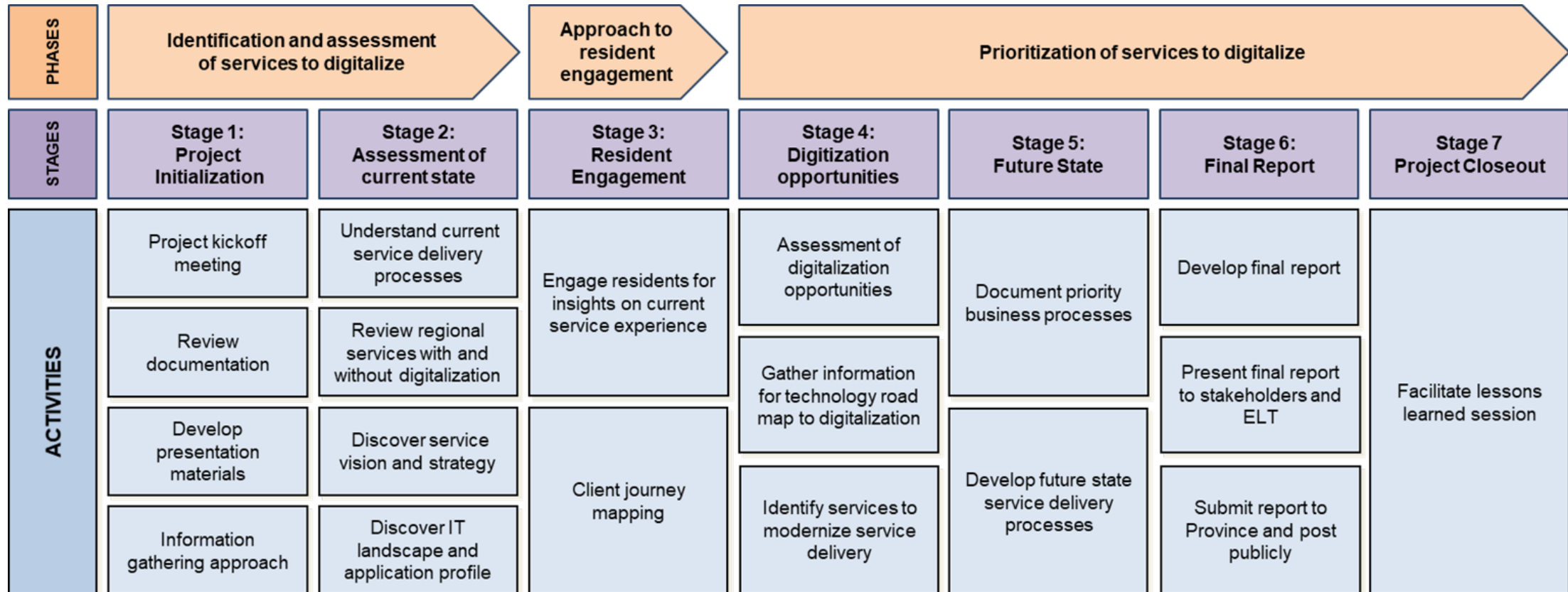
# Methodology & Approach

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*Finding solutions that will result in services becoming more efficient and modernized while maintaining legislated requirements and excellence in customer service.*

# Methodology & Approach

The project approach included extensive consultations with residents and businesses in the form of surveys, focus groups and journey mapping. Working sessions were conducted with Region staff and management, with participation of front-line staff that interact with residents and businesses. The project was completed over a seven-month period starting in March 2021.





# Benefits of Digitalization

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*Digitalization enables the Region to service residents at their convenience, improve operating efficiencies and customer experience.*



# Benefits of Digitalization

## Improving the Region's ability to service residents

The benefits of digitalization include:

- **Reducing costs** through operating efficiencies and shifts to lower cost delivery channels.
- **Increasing opportunities** to better address resident needs by applying innovation, design, and digital technologies to existing services and creating new ways of delivering services.
- Increasing the **accessibility of services** to a larger group of residents and businesses.
- Assisting the Region to meet environmental, social and governance objectives.

Digitalization Opportunity	Benefit
<p>Ability to define “end to end” service processes for groups of similar services</p> <p>Use customer research and service design blueprints as enabling disciplines to drive better CX &amp; OPEX</p>	<ul style="list-style-type: none"> <li>• Provide a consistent customer experience for residents for similar types of services across business areas</li> <li>• Manage a common set of supporting processes and technologies across business areas</li> </ul>
<p>Ability to manage, track and report on customer interactions</p>	<ul style="list-style-type: none"> <li>• Ability to manage interactions and interaction history to report progress and completion when important</li> <li>• Utilize reporting to monitor service delivery targets and promised results</li> <li>• Ability to identify bottlenecks in service delivery as well as process improvement opportunities</li> <li>• Ability to report on the types of services requested and identify trends</li> </ul>
<p>Ability for residents to schedule appointments/inspections online</p>	<ul style="list-style-type: none"> <li>• Provide self-service to residents</li> <li>• Reduce repetitive calls to Region staff</li> <li>• Ability to send customer confirmations and reminders</li> </ul>
<p>Ability to submit requests, registrations and applications online once and integrate the data from web and mobile submissions through to department applications without re-keying data</p> <p>Utilize portal technology to provide an online hub for customer interactions.</p>	<ul style="list-style-type: none"> <li>• Ability to manage the submission as an interaction, including the ability to report on status, completion, and service level performance</li> <li>• Ability to build a customer interaction history and a 360-degree view of the customer</li> </ul>

# Benefits of Digitalization

These benefits improve the ability of the Region to service residents at their convenience, improve operating efficiencies and, when implemented effectively, promote improved customer experience.

The digitalization of services, or Digital Transformation, is defined as “the use of digital technologies to change a business model and provide new revenue and value-producing opportunities; it is the process of moving to a digital business.”

(Gartner)

Digitalization Opportunity	Benefit
Event Management	<ul style="list-style-type: none"> <li>Ability to accept event applications online and manage the event using workflow across business areas. Each area is notified of the event, can plan their response and approval as well as include related documents to the event file</li> <li>Can quickly identify the progress of the event preparation through pre-determined steps</li> </ul>
Complaints and Feedback Request for Service	<ul style="list-style-type: none"> <li>Ability to receive feedback for continuous improvement, manage and report on the status of the interaction electronically</li> <li>Can utilize templates for consistent communications with residents</li> <li>Utilize reason and resolution codes to facilitate reporting by area on key issues</li> <li>Manage the interaction and ensure that all interactions are responded to within service level targets</li> </ul>
Ability to book programs and courses online	<ul style="list-style-type: none"> <li>Provide self-service to residents</li> <li>Ability to communicate with residents, including sending them information on a proactive basis</li> </ul>
Ability to setup online shopping cart storefront	<ul style="list-style-type: none"> <li>Ability to sell items online and accept payments</li> <li>Reduce the requirement for cheques to be mailed or cash to be paid in person</li> </ul>
Electronic signatures	<ul style="list-style-type: none"> <li>Ability to digitally sign applications, requests and documents</li> <li>Remove requirement for forms to be signed and returned in-person or by mail</li> </ul>
Electronic payments	<ul style="list-style-type: none"> <li>Ability to submit a payment online</li> <li>Remove requirements for payments to be submitted by cheque, certified cheque or cash in-person</li> </ul>

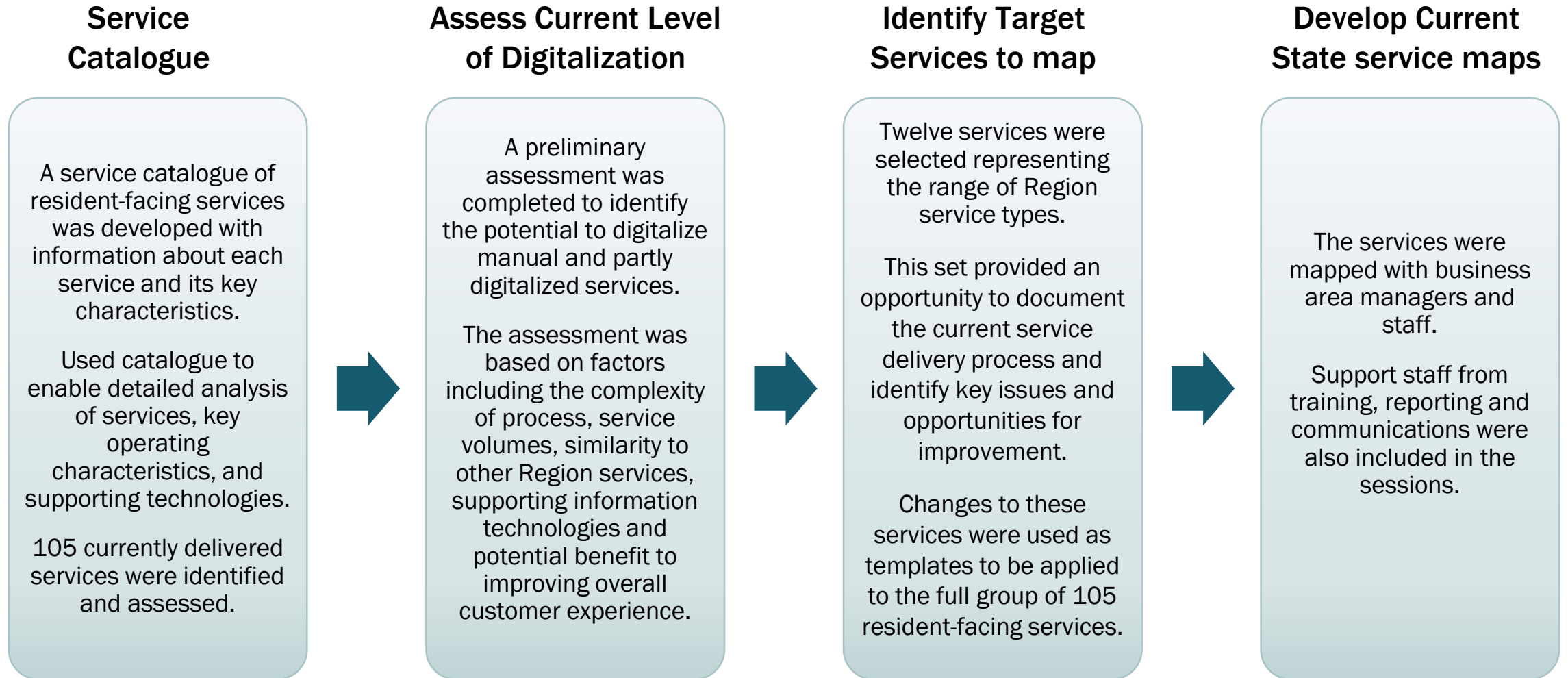
# Key Findings: Current State

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*Focusing on understanding current services, resident experience, and modernization opportunities*

# Current State Service Process Review

The selected services were mapped utilizing the following approach:



# Service Catalogue & Opportunities for Digitalization

- 105 currently delivered services were identified and assessed.
- A preliminary assessment was completed to identify the potential to digitalize manual and partly digitalized services.
- The assessment was based on factors including the complexity of the service process, the service volumes, similarity of the service to other Region services, the supporting information technologies and the potential benefit to improving the overall customer experience for residents.
- Each of the manual and partially digitalized services were assessed to identify the potential for further digitalization, cost savings and efficiencies.
- Each of these services was assessed in terms of “low, medium or high” potential. Services that were categorized as “low” were removed from the opportunity assessment summary to focus attention on higher potential services.

Level of Digitization	Findings
Manual services	<p>76 services were identified as manual services. These are services delivered manually with no digital channel involvement.</p> <p>Of the 76 manual services, 46 were identified as medium or high candidates for digitalization.</p>
Partly digitalized services	<p>10 services have been identified as partly digitalized, or as digitally supported services. These are services that are delivered partially online, but client must perform some manual process.</p> <p>Of the 10 partly digitalized services, 8 were identified as medium or high candidates for digitalization.</p>
Fully digitalized services	<p>19 services were identified as digitalized services. These are services delivered fully online from the client perspective, but Region staff must perform some manual processes or intervention.</p>

# Service Process Review - Approach

The service catalogue identified 105 resident-facing services. Each service was categorized as being of one or more service type.

Twelve services were selected that represented the range of service types across the Region.

This set of services provided an opportunity to document the current state service delivery process and identify key issues and opportunities for improvement across all resident services.

Changes to these 12 services can be used as templates and applied to the full group of 105 resident-facing services.

This table lists the set of services mapped and their Service Type. Each Service Type is detailed through one or more service process maps.

Service	Area	Register & Apply	Request for Information	Permits	Request for Service	Purchase	Notify	Report
Freedom of Information Request	Clerk's		X			X	X	
Register for Prenatal Classes	Family Health	X						
Register for Infant Feeding clinic	Family Health	X						
Inspection Request / Complaint	Health Protection, Public Works							X
Purchase a PAMA gift or Corporate gift	PAMA					X		
Request your Ambulance Call Report	Paramedics				X	X	X	
Scheduling & Bookings	Public Health, PAMA	X						
Get your water bill	Public Works Ops Support				X			
Request a road permit	Roads			X			X	
Complaint / refund request	TransHelp					X	X	X
Repair a broken cart	Waste Management				X			
Request water turn on/off	Water & Wastewater				X		X	

# Service Process Review - Approach

The selected services were mapped using a working group approach with business area managers and staff with customer-facing roles. Region staff that offer related services, such as training, reporting and communications were included in the sessions.

The service processes were mapped at the Level 2 - Activity Level. This level of detail provides the working group with the ability to document and assess key activities and tasks of the end-to-end process as well as identify the interactions with the customer and related service level promises, the handoffs between business areas and departments, and the key systems and applications used.

Two working sessions were conducted with each area to develop the maps:

## Working Session 1:

- Gather information relating to how the service is delivered
- Identify key activities, resident interactions, handoffs between business areas, systems and applications used
- Identify challenges and issues within the process and what is working well

## Working Session 2:

- Validate the process map
- Identify customer experience and digital improvement opportunities



# Key Findings: Resident Engagement

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*Understanding resident experience and valued improvements*



# Resident Engagement - Key Themes

Resident engagement involved three key activities:

- Resident focus groups (a total of 44 participants across 5 focus groups)
- Customer journey mapping sessions (a total of 38 participants across 8 sessions)
- Online survey (610 respondents)

The findings and insights from all resident engagement evolved into the set of themes and recommendations.

## 5 Key Themes

1

### **Send receipt and status updates for service requests.**

Notify residents via email or text message at key steps in the service delivery process.

2

### **Provide a service promise for all service requests.**

Set customer expectations for key steps and milestones of service processes.

3

### **Provide self-service feedback mechanisms.**

Solicit feedback from residents regarding their satisfaction with the services delivered. Set-up a process to review and act on feedback received.

4

### **Enable online submission of requests and payments.**

Simplify processes to combine or eliminate multiple steps and interactions.

5

### **Services available online should also be made available by phone.**

Services should be offered through more than one channel to provide options to meet preferences of specific customer segments.

# Resident Engagement – Recommendations

A trend of similar feedback emerged from residents within all the engagement sessions that indicated a series of clear recommendations within **3 priority areas** that the Region of Peel should consider to improve service delivery.

**1**

## Digitalization of Processes

- Submitting applications, requests and documents online
- Ability to make an electronic payment
- Have one online “My Account” with a single sign-on and 2-step authentication for secure items such as the ability to make account changes (e.g., Water Billing)
- Register for public health programs
- Report a project concern or request information

**2**

## Front-end Digital Services

- Easy and quick searching or navigating to an online service
- Provide relevant contact information in case a person needs help
- Use menus to cluster services and find them easily
- Fill, sign and submit forms and requests online
- Ability to submit documents online
- Ability to check or communicate status of a request or process
- Track progress of an application or permit

**3**

## Customer Experience

- Create processes that can report completion and/or time to follow-up
- User test new digital processes for simplicity with easy-to-use and easy-to-execute characteristics
- Communication of service request receipt and of progress status (an important moment of truth that should be part of standard service design)
- Matching a service promise to normal delivery capability
- Providing an agent support option in process steps to encourage online completion

*More than 50% of all residents participating in the focus groups or responding to the survey indicate that they go online first. A website that acts as a doorway to digital services will be an important key factor of success for the uptake of new digital services.*



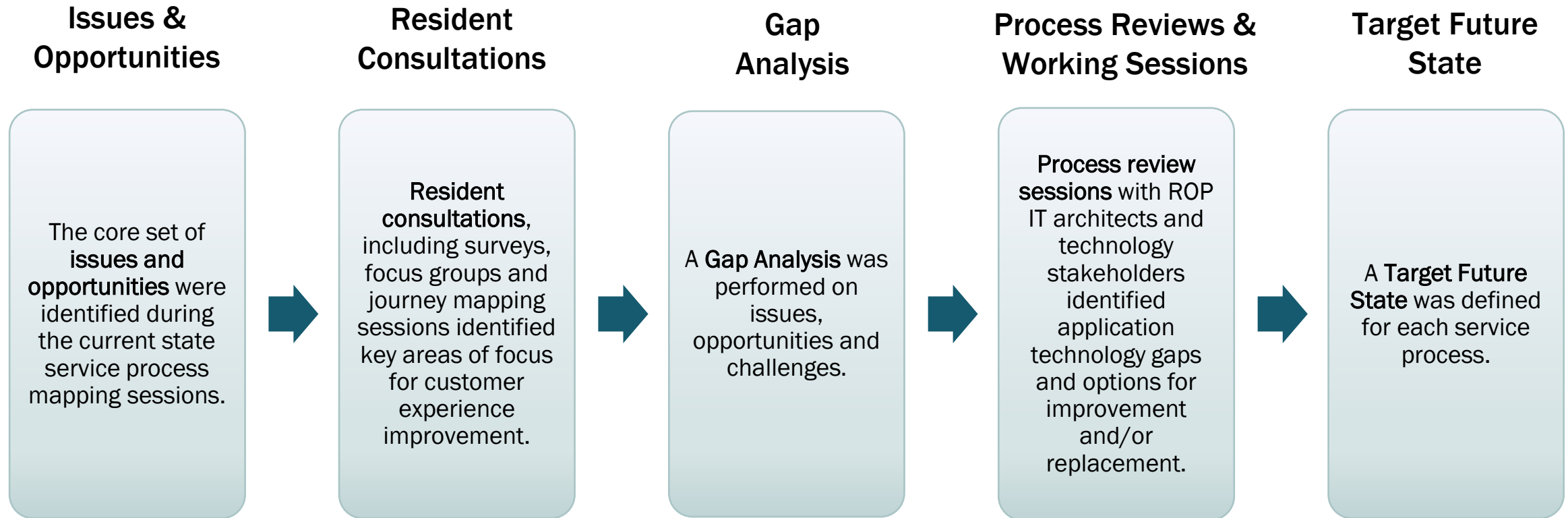
# Key Findings: Target Future State

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*Focusing on defining future service delivery processes, resident experience and enabling technology requirements.*

# Future State Processes - Approach

The selected services were mapped leveraging work from previous stages of the project:



# Gap Analysis and Defining the Target Future State

A gap analysis, target future state and recommendations have been developed using the following approach. These recommendations will provide input into the development of initiatives and modernization roadmap.



Gap	Target Future State	Recommendation
Residents cannot submit requests online and attach supporting documents. Must call or submit applications by email or mail.	Residents can initiate requests online and submit supporting documents.	Enable online requests and document submissions.
Online registrations do not link to related services or provide recommendations for related services.	Related services are presented to residents as recommendations when researching or submitting requests.	Include qualifying questions, or content triggers, that link residents with additional related services.
Customers cannot submit payments online. They must be submitted by mail, in-person or over the phone.	Customers can view invoices and make payments online.	Update payment processing applications to enable online customer invoicing and payments.
Customer must sign and return permit contracts by email. Staff must manually download and attach documents to document management systems.	Customers can sign and submit documents through an online portal. Documents are automatically associated with requests and customer.	Enable online portal for residents to sign and submit documents.
Customers cannot check the status of their requests online. They must call or email the Region.	Customers can lookup the status of their requests online.	Ensure status is available directly to residents via online self-service and the resident portal.
Staff re-assign tasks between Tier 1 and Tier 2 that can be simplified and automated,	Routine tasks are automated. For example, standard email send outs are triggered automatically when a specific case status is reached.	Routine tasks are automated using case management workflows, notifications and communications templates
Paper files create handling and archiving costs. Client assessments files must be managed between staff and offices for action, storage and long-term archiving.	Case management files are digitalized and managed and shared between staff using common applications and stored and archived electronically.	Replace paper case management and assessment files with electronic case management, workflows, access rights and digital archiving.

# Gap Analysis and Defining the Target Future State

Gap	Target Future State	Recommendation
Staff use desktop applications, including spreadsheets and custom databases, to track customer interactions, information and tasks that cannot be captured in existing case management applications. Staff must look in multiple places to understand the status of a case.	Region core applications capture the full set of information, tasks and notes required to manage a customer interaction.	Enhance case management applications to include fields, tasks and workflows that are currently captured in secondary applications.
Customers are not consistently notified of steps in the process or outcomes, including when they need to contact the Region to proceed with a particular action or task.	Customers are notified by text or email when a next step action is required. Customers can view the status of their request online including next steps.	Enable email and text notifications for the key steps in the service delivery. Enable customer portal showing key steps in the service process.
Customers have to repeat call details when transferred between agents.	Contact centre agents have customer information displayed automatically or have been briefed by the original agent when receiving a call transfer.	Calls are transferred between agents as a warm transfer which includes a verbal update from the first agent or a telephony screen pop of account and case information.
Staff and residents cannot purchase items online or add funds to their accounts (e.g., PAMA gifts, TransHelp taxi scrips). Must be purchased by phone, mail or in-person.	Online shopping and payment is available as a self-serve option to residents and staff.	Enable online shopping. Consider an ecommerce application that also supports inventory management and POS processing.
Supervisor approvals are managed using paper forms.	Approvals are initiated, tracked and stored within the case management application and managed via workflow.	Develop approval processes in applications to replace paper forms. Enable occasional users to have "partner license" access to case management systems.
Callers with urgent, non-emergency needs have to wait on the phone in the same call queue as non-urgent callers.	Customers can indicate their call type when calling the contact centre. Certain call types will be placed in a priority call queue for quicker service.	Implement IVR functionality to prioritize urgent call types.
Field staff do not utilize mobile apps to view and manage work orders. This requires multiple emails between administrative and field staff for notifications and work order status updates.	Dispatch can assign work orders to field staff within the application. Field staff manage, update, re-assign and close work orders using mobile technology and the application.	Enable and train field staff to view and manage work orders online. Eliminate manual email notifications from dispatch and manual updates of completed work orders.

# Future State Processes – Summary of Key Changes

The following key changes have been incorporated into the future state service delivery processes:

Area of Change	Description of change
Requests for Service	<ul style="list-style-type: none"> <li>Replace email, phone and fax requests with the ability to submit requests and registrations online.</li> </ul>
Payments	<ul style="list-style-type: none"> <li>Replace paper cheques and phone payments with online payments.</li> </ul>
Online Portal	<ul style="list-style-type: none"> <li>Enable a single online portal as a means for residents to submit applications, requests and payments, to track completion status and to securely upload or receive correspondence and documents.</li> <li>Enable residents to schedule appointments online.</li> </ul>
Case Management	<ul style="list-style-type: none"> <li>Replace multiple databases and applications used to log and track customer interactions with the use of one case management application.</li> <li>Eliminate the use of desktop applications, including spreadsheets and databases, by updating the information fields captured in the case management systems with the specific custom fields required by the business areas.</li> <li>Eliminate agent pivots to copy, paste and transcribe information between case management and work order applications through system and data integrations or the use of RPA (Robotic Process Automation) software and approaches.</li> </ul>
Paper records and file management	<ul style="list-style-type: none"> <li>Replace paper case files with case management tools. Replace clinical assessment paper files with electronic medical records. Replace paper forms, workflows for internal approvals and requests with electronic workflows integrated with case management solutions.</li> <li>Reduce costs related to paper files through digitalization, including a reduction in courier costs to move files around, and a reduction in storage and archiving paper files.</li> </ul>
Technology	<ul style="list-style-type: none"> <li>Improve cost and process efficiencies and the quality of customer information by replacing department “point solutions”, single-use solutions utilized within one area of the Region, with fully supported enterprise-wide core applications.</li> </ul>
Customer notifications	<ul style="list-style-type: none"> <li>Eliminate repetitive agent tasks related to outbound notification emails and phone call updates with automated electronic notifications and communications. This will also eliminate the assignment of these tasks between Tier 2 and Tier 1 contact centre agents.</li> </ul>

**These service process changes will result in a significant improvement in customer experience, replace duplicate applications with core standard applications and result in digitalization savings when implemented.**

# Future State Process Example: Ambulance Call Report

Requests for Ambulance Call Report is one of the services that have been mapped to identify opportunities for improvement. Current and target future state maps have been developed.

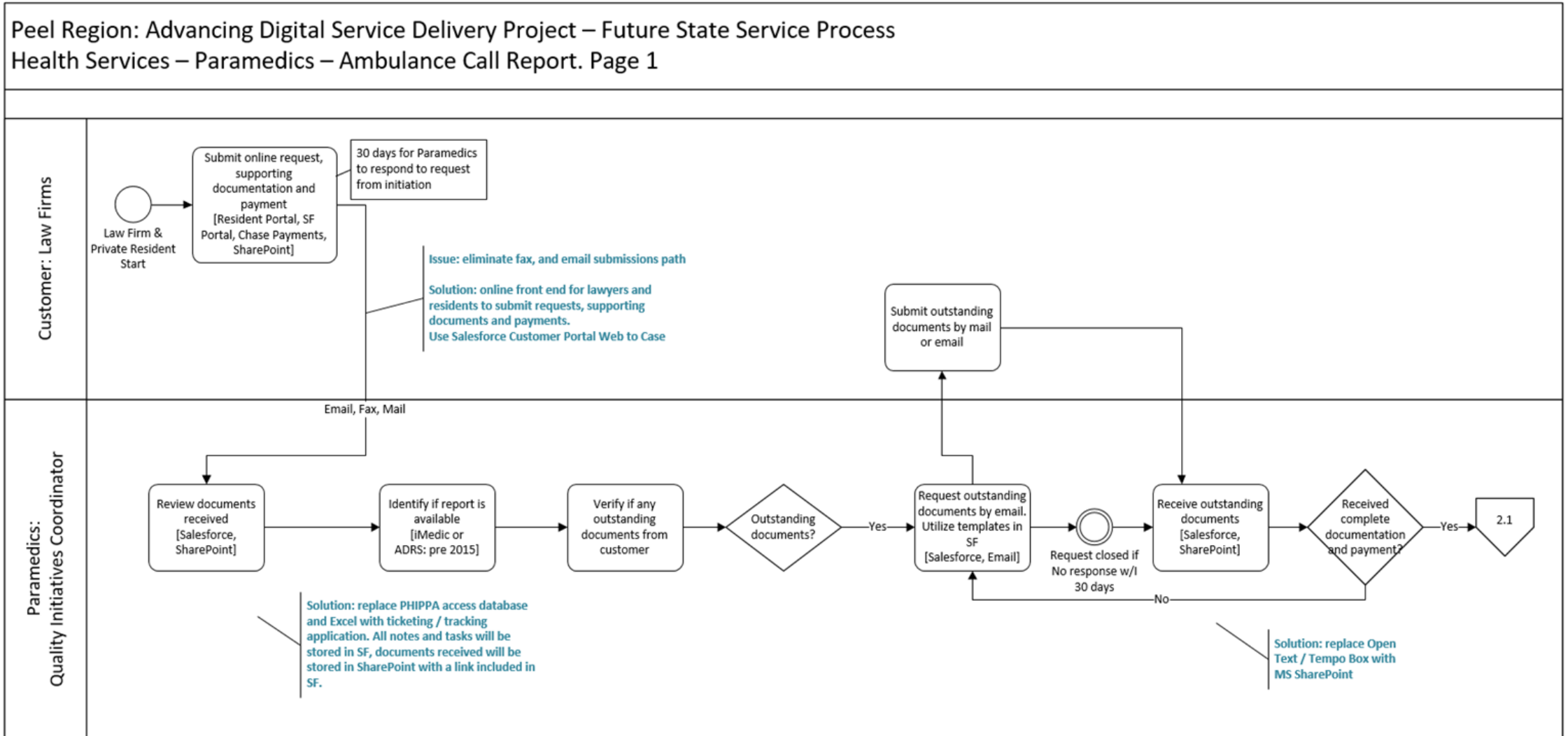
The table below summarizes the key issues identified in the current state service map and the key changes included in the future state service map.

From Current State	To Target Future State	Approach
Email and fax requests	Submit requests online	<p>Customers currently have to submit Ambulance Call Report requests, and supporting documents by email. Supporting documents include those required for requests by lawyers, and identification documents for personal requests.</p> <p>The target future state would replace PDFs and email submissions with an online form that can be used to submit a request and attach supporting documents.</p>
Mail cheques or phone in payments	Online invoicing and payments	<p>Customers currently have to submit payment by cheque, requiring additional steps by the customer and payment tracking, interoffice mail and paper deposits by Finance. The target future state will enable online payments and invoicing.</p>
Setup a separate account to receive the Call Report in electronic format	Online portal as a central point of communications	<p>Customers have to create a separate account in a document management portal so that the Region can send the Ambulance Call Report electronically. The target future state includes an online portal that provides a web-based approach to submit applications and act as a delivery mechanism to securely deliver the Ambulance Call Report digitally.</p>
Customers cannot view the status of their submission online	Customers can view the status of their request online	<p>The current use of multiple desktop applications to log and track interactions prevents the ability of residents and staff to quickly view the status of a request. Multiple spreadsheets and databases have to be accessed to obtain a full picture of the interaction and status.</p> <p>The target future state will replace these multiple systems with an integrated case management approach that provides a single place to track and manage customer requests and status. This status can be made available online to requestors.</p>



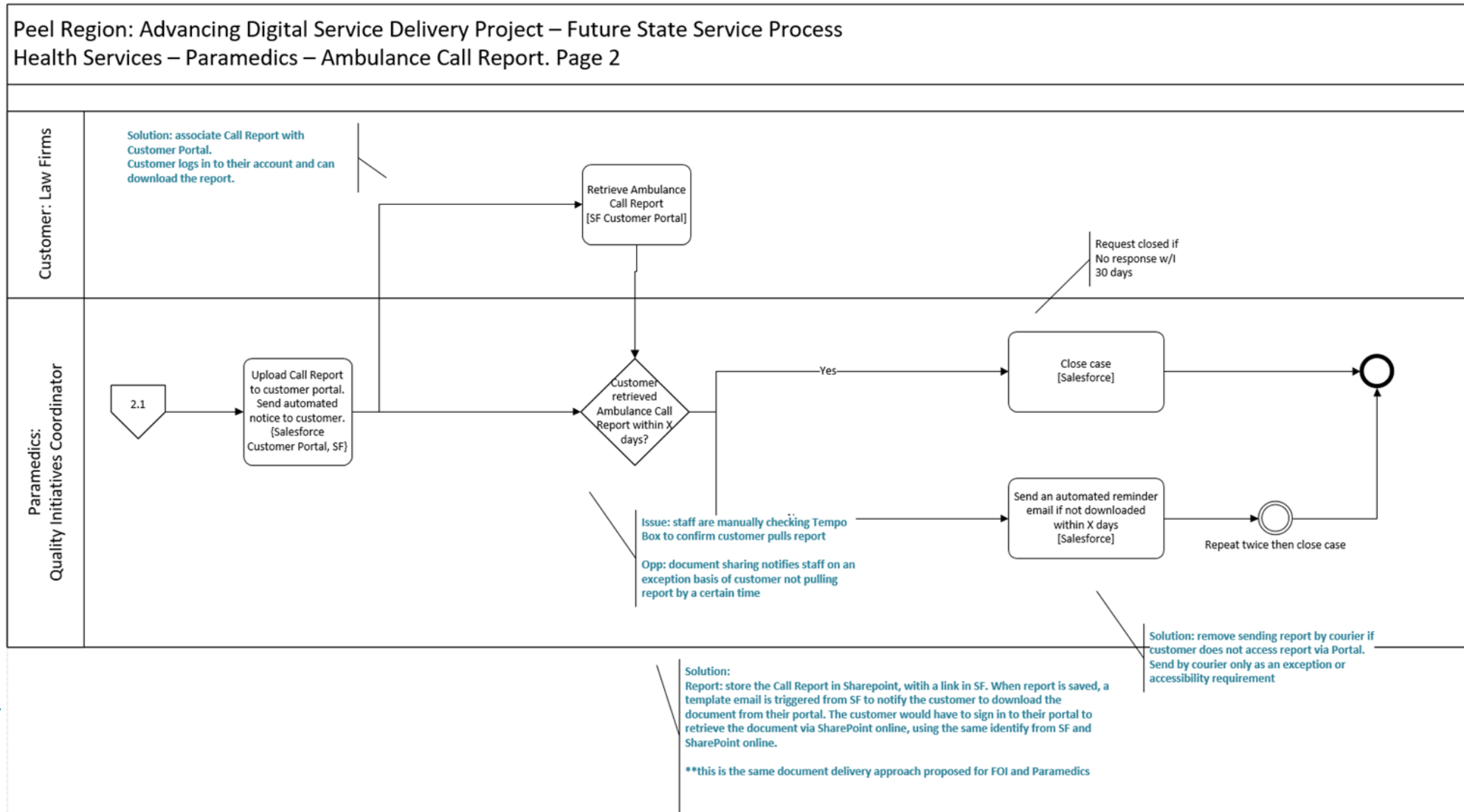
# Future State Process Example: Page 1

The sample map on this page details the target future state Ambulance Call Report service process. This map is the first of two maps in the service process.



# Future State Process Example: Page 2

The sample map on this page details the target future state Ambulance Call Report service process. This map is the second of two maps in the service process.



# Strengths, Issues, Opportunities & Challenges

The findings were reviewed within the context of the conditions required for a successful digitalization program, which includes building on current strengths, addressing existing issues, leveraging identified opportunities, and mitigating any key challenges for success.

The results, recommendations and insights from the project were reviewed within the context of the conditions required for a successful digitalization program. The conditions are summarized below within the context of:

- Building on Peel **strengths**
- Addressing the important **issues** discovered
- Leveraging **opportunities** identified
- Addressing key **challenges** for success

Strengths	How included in digitalization plans
The Region of Peel has the majority of applications required to proceed with their digitalization initiatives, and applications minimizing required procurements.	<ul style="list-style-type: none"> <li>• Reduced the need to evaluate additional applications</li> <li>• Shortened the implementation roadmap timeline</li> </ul>
IT has a number of projects in stream related to the foundational requirements of a digitalization program that can be used to inform and accelerate the roadmap.	<ul style="list-style-type: none"> <li>• Current projects are referenced as inputs requiring coordination with the proposed roadmap</li> </ul>
Region of Peel Service Excellence and Innovation (SEI) Department has started developing in-house service design and customer experience design capabilities.	<ul style="list-style-type: none"> <li>• In-house capabilities provide long-term resource options to support the Digital Services Roadmap implementation</li> </ul>

# Strengths, Issues, Opportunities & Challenges

Issues	How included in digitalization plans
<p>There is a lack of integration between applications. Systems are not integrated end to end and require multiple agent “pivots” to enter or access separate pieces of information to support customer interaction and service delivery.</p>	<p>The Digital Services Roadmap includes technology workstreams focused on developing integrations between systems. Integration approaches include the replacement of stand-alone applications with Region enterprise systems/applications that can be integrated using standard methodologies, or the use of robotic process automation (RPA) for applications that require an exception approach.</p>
<p>Status updates are unavailable to residents via online services. They are also often not available to Tier 1 agents using core Region case management and ticketing applications. Core Region applications are not integrated with specialized department applications.</p>	<p>The Digital Services Roadmap includes technology and service design workstreams focused on implementing new services and developing integrations between systems. Once completed, the service process can be designed to provide Tier 1 agents with access to status dispositions from service requests and work orders.</p>
<p>Customer interaction history, status and key documents are fragmented across multiple systems.</p>	<p>Stand-alone systems and desktop applications are being replaced with core Region systems/applications, that can provide a single source point of view of a customer.</p>
<p>There is large variation in the approach to forms. There are restricted capabilities to attach/submit required documentation, pay fees and sign these forms before submitting them.</p>	<p>The Web Services workstream provides a common, updated and modern approach to online forms, attachments and payments.</p>
<p>Field staff are not consistently using the same applications used by the contact centres or division staff. Assignments to field staff and updates returned by them are often supported by a mix of email messaging, spreadsheets, or the inconsistent use of department applications.</p>	<p>Options have been defined to implement a core application (ServiceMax) that will be used by field staff. This application will be integrated with the applications used by contact centre and division staff.</p>

# Strengths, Issues, Opportunities & Challenges

Opportunities	How included in digitalization plans
<p>Develop a more disciplined approach to master data management where versions of the truth data are located, accessed and stored.</p>	<p>Developing an approach to Master Data Management is included as an initiative on the Digital Services Roadmap.</p>
<p>Many Region services can be supported by common approaches and standardized functional components. The Region can establish a set of digital templates for processes that will provide for rapid cost effective building of easy to use customer and user-focused services.</p>	<p>The Web Services workstream of the Digital Services roadmap includes initiatives to develop common designs for web services. The Service Digitalization workstream uses a template approach to implement common approaches across service types and components.</p>
<p>There exists opportunity for savings and improved customer experience in moving to a reduced number of core systems and using a “what prevents you from” approach to enterprise system replacement over time.</p>	<p>Eight applications have been identified as candidates for replacement. These applications are those that are not integrated with other Region applications, are department “point solutions” or are applications that are planned for retirement.</p>
<p>There are a number of processes that were developed with basic checks and balances to maintain privacy and security. These should be reviewed for simplification and the application of new approaches for this purpose.</p>	<p>The target future state services leverage updated technologies and service design principles, including secure customer portals for document management and signatures, online payments that are PCI compliant, and audit processes that systemically flag potential fraudulent activity.</p>

# Strengths, Issues, Opportunities & Challenges

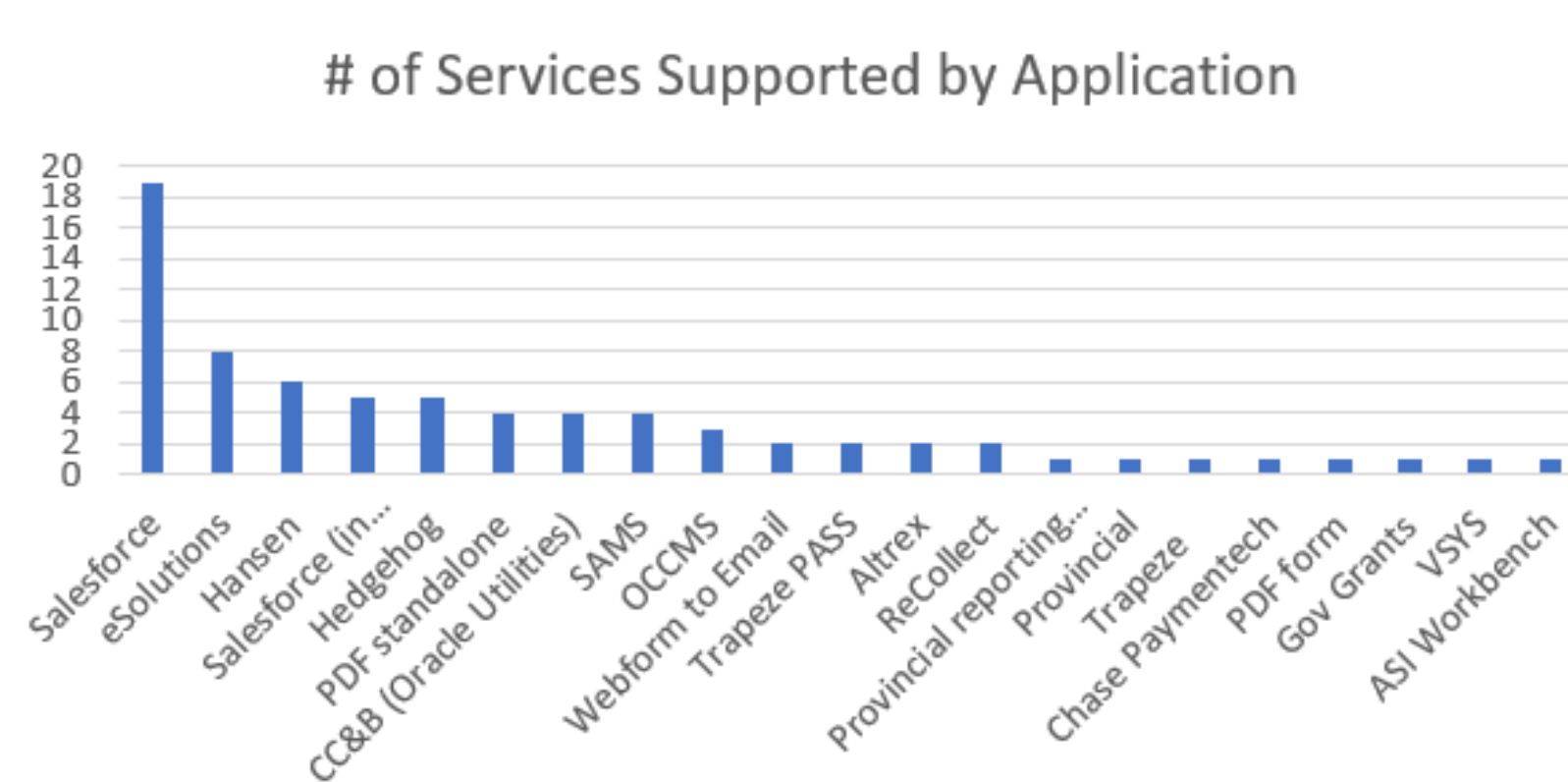
Challenges	How included in digitalization plans
<p>The Region of Peel operates under a decentralized governance model with high departmental autonomy. For rapid development of digital services, a shift from business area-led investment in digital services to an enterprise-wide roadmap with associated governance, support, and funding is required. This approach should also be supported by executive accountability to set targets and measure performance to reach the desired digitalization and related business outcomes.</p>	<p>The Program Governance workstream in the Digital Services Roadmap includes initiatives focused on governance, program management and funding models.</p>
<p>Departments are operating in digital silos. A common approach is needed to benefit the Region's digitalization efforts.</p>	<p>The Digital Services Roadmap is focused on designing and implementing common service designs and customer experience.</p>
<p>The number of separate customer portals facing Peel residents is continuing to grow. Many are still in the planning and implementation phase. Resident consultation and surveys are indicating that they wish to have one single point of access to these portals as well as a single sign-on approach to enter these areas.</p>	<p>The Program Governance workstream provides an opportunity for Region business areas and management to identify and focus on the key attributes of a common service design and customer experience, and to ensure that the supporting technologies implemented (i.e. multiple citizen portals) provide a consistent, integrated and simplified customer experience.</p>

# Core Supporting Applications in use by the Region

The listing of core technology applications supporting each service was identified as part of the Service Catalogue.

More than twenty-one technology applications have been identified; these include citizen-facing applications, web applications and applications used by staff to manage the service delivery. Ten of these applications support 80% of the services.

Several of these applications are similar in purpose but are supporting individual departments.



Too many systems duplicating the same functionality.

Opportunities exist to consolidate the number of similar applications to leverage common technologies, share costs, standardize processes and customer experience designs.

# Technology Review, Gaps & Improvement Options

The service process review and consultations with Region of Peel Enterprise Architects and technology stakeholders identified application technology gaps and options for improvement and replacement.

## Applications to retire/remove

The following applications have been identified as candidates for retirement or removal as a technology enabler in the service delivery process:

- Microsoft Access databases: supporting department point solutions
- Tempo Box (Open Text web access)
- Different point of sale solutions used across divisions
- AMS eSolutions event management (already planned)
- Hansen (already planned)
- MS Power Apps (as a Work Order)
- Nordat FOI database
- TTED – Health Services
- Kofax

## Replacement applications

These are applications that have been reviewed and approved by IT for use as core applications across the Region:

- Drupal web services
- Salesforce Community Portal
- SharePoint for Document Management and upload
- Maximo (in planning stage)
- Chase Payments
- EZ Wallet
- ServiceMax (Salesforce platform application)
- Book-It Peel (Salesforce platform application)
- Input Health EMR (electronic medical record)



# Services Prioritization

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*Identifying services that are medium and high candidates for digitalization.*

# Assess and Prioritize Services for Digitalization

The Service Catalogue of 105 services was filtered to identify those that are medium and high candidates for digitalization, and services with volumes greater than 220 transactions per year. Twenty-seven services were identified for assessment and prioritization.

The following prioritization criteria was applied:

- Essential in a crisis
- Cost reduction potential
- Customer experience change
- Program area readiness for change
- Highest risk for not modernizing

The results were refined to include services considered as “lighthouse” services; those that, after digitalization, can be used as templates to be applied to similar services.

Priority	Services included in Priority Grouping
Highest priority and “Lighthouse” services	Inspection Request / Complaint Complaint/refund request Request a road permit Request Water Turn Off / On Freedom of Information Request Request Your Ambulance Call Report Help for people with disabilities Apply for TransHelp Buy Taxi Scrip Make a Payment
Second set of priority services	Peel Inclusion Resource Services (PIRS) Get help paying for funeral arrangements Report a construction project concern / request information Request Water Locates
Third set of priority services – post Covid	Property Information Request Form Receive Public Health Nurse telephone support Register for Healthy Babies Healthy Children program Register for Healthy Pledge Program Report a non-medical immunization exemption Food Handler Certification Make an appointment at a baby feeding clinic Report New Business AED Registration & Information Update Register for prenatal classes Register for prenatal eLearning Register for the breastfeeding companion peer support program Special Event Permits



# Digital Services Roadmap & Initiatives

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*Each initiative is focused on implementing a key set of digitalization improvements, with efficiencies and customer service benefits becoming available at each step.*

# Digital Services Strategy Roadmap

		2021				2022				2023				2024				
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Workstream 1: Program Framework and Standards</b>																		
1.1 Establish governance and program office model	●	●																
1.2 Develop core principles and digital service standards	●	●	●	●														
1.3 Establish policies, funding model and approval process		●	●															
1.4 Develop detailed requirements for digitalization of prioritized services					●	●	●											
<b>Workstream 2: Website Front-end Design</b>																		
2.1 Develop information architecture, search taxonomy, & standard services approach	●	●	●															
2.2 Design and develop prototype functional design templates		●	●	●														
2.3 Front-end services design: Register, Apply, Request, Refund, Account Open/Close			●	●														
2.4 Front-end services design: Status/Notification & Workflow					●	●	●											
<b>Workstream 3: Technology Modernization</b>																		
3.1 Declare core systems and establish decommission strategy			●															
3.2 Decommission identified systems aligned to roadmap deployment					■	■	■	■	■	■	■	■	■	■	■	■	■	■
3.3 Procure new technology applications and services					■	■	■	■										
<b>Workstream 4: End-to-end Digital Service Delivery</b>																		
4.1 Establish master data management approach for digital services		●	●	●														
4.2 Service digitalization: group 1 - Online forms, attachments & data capture					●	●	●											
4.3 Evolve resident portal to be single access to all authenticated services							●	●										
4.4 Service digitalization: group 2 - Integrations & field updates										■	■	■	■					
4.5 Service digitalization: group 3 - Case management, workflow & notification																■	■	
4.6 Service digitalization: group 4 - Replace paper, digitize & archive										■	■	■	■	■	■	■	■	

# Digital Services Initiatives

Seventeen major initiatives within four workstreams were identified to advance the creation of new digital services.

Workstream 1: Program Framework and Standards		
Initiative	Description	Key Activity
1.1 Establish governance and program office model	<p>It is recommended that the governance initially be centered within a Program Office structure as the long-term foundational Governance Model is being implemented.</p> <p>This interim state will allow for governance and management to be put into a leading practice context and tuned for the design and build of foundational elements while a long-term model is evolved.</p> <p>This approach will be used to fast track the time to savings and benefits.</p>	<ul style="list-style-type: none"> <li>Identify Champions and Program management individuals.</li> <li>Establish Executive Sponsor governance for rapid decision resolution.</li> <li>Establish an action-oriented framework where decisions requiring a quick turnaround can be made.</li> <li>Set up the Program Office to rapidly implement the digitalization strategy and the functionalities of the recommended Roadmap.</li> <li>Confirm project scope, timelines and initiative staffing.</li> <li>Implement operational components of Memorandum of Understanding for Governance with each business unit agreeing to adequately support the Program.</li> <li>Identify Business Unit staff that will be responsible for managing each Business Unit's digital initiatives.</li> <li>Implement Tactical Change Management.</li> </ul>

# Digital Services Initiatives - continued

Initiative	Description	Key Activity
1.2 Develop core principles and digital service standards.	Core principles and standard operating approaches associated with the implementation of digital services are developed and used by the governance structure to guide the approval and quality assurance of services before implementation.	<ul style="list-style-type: none"><li>• Develop core principles and standard approaches for the implementation of new digital services.</li><li>• Develop criteria and characteristics to be followed for the introduction of new digital services.</li><li>• Establish a service promise for each service. Each service should include a confirmation, set an expectation for normal completion of the request and provide a completion notification.</li><li>• For each target service for digitalization, establish guidelines for service standards and standard status notifications to residents for departments to enhance customer experience to users.</li><li>• Determine how principles will be used to quality assure a consistent user experience and accessibility.</li><li>• Establish measures associated with customer satisfaction and service excellence in accordance with Client Satisfaction Measurement Strategy.</li></ul>

# Digital Services Initiatives - continued

Initiative	Description	Key Activity
1.3 Establish policies, funding model and approval process	These policies will define how digital services will be implemented through the primary service channels and how they will be supported.	<ul style="list-style-type: none"> <li>• Create a set of formal policies for the digitalization of services that will be developed and validated with departments.</li> <li>• Create a funding model for development, maintenance and enhancement of digital processes using Peel core enabling technologies.</li> <li>• Establish conditions for approval outside the standard norms for implementing digital service types.</li> </ul>
1.4 Develop detailed requirements for digitalization of prioritized services	Convert and transform the identified current services and the high-priority desired online services into digitalized services in the new Region of Peel website. Redesigned forms and services will be built, validated and user tested in downstream initiatives.	<ul style="list-style-type: none"> <li>• Determine which services are of high-value to citizens and businesses that should be a top priority for the Region to offer online.</li> <li>• Identify which forms should be converted into a dynamic, electronic form service.</li> <li>• Each form and service are redesigned into a standard approach.</li> <li>• Identify “lighthouse” service processes to be used to develop standard approaches to each service type.</li> <li>• Each service is process mapped and evaluated for potential to transform it for greater efficiency and end-to-end service capability.</li> <li>• Build standard self-service approach templates for each service type.</li> </ul>

# Digital Services Initiatives - continued

## Workstream 2: Website Front-end Design

Initiative	Description	Key Activity
<p>2.1 Develop information architecture, search taxonomy, and standard services approach</p>	<p>This initiative creates the information architecture that will drive the structure and layout of the new Region website. The architecture includes visual representations of the content of the main web pages, and a sequence of pages to illustrate navigation pathways and interactions.</p> <p>Concurrently, a new search taxonomy is developed to optimize discoverability of content and services through the search function.</p> <p>A new standard and stepped approach is created to the access of service information and how the digitalized service is executed. (Ready, Set, Go approach)</p>	<ul style="list-style-type: none"> <li>• Detailed analysis of current content with action plan (rewrite, delete, archive, migrate) for each component.</li> <li>• Build a structured, visual sitemap that shows an architectural overview of the key pages of the site, their levels, and their relationship to each other.</li> <li>• Build wireframe templates of each unique page of the website.</li> <li>• Create design mock-ups and simulation in order to validate key design templates, core navigation flow and user experience with key target audiences/segments.</li> <li>• Test core design with representatives of target groups.</li> <li>• Develop a new, intuitive taxonomy, the more focus placed on organic search engine optimization efforts, the more likely you are to add quality copy to your website.</li> <li>• Create a standard web/mobile approach for the front-end access to digital services             <ul style="list-style-type: none"> <li>- Leader page</li> <li>- Instructions to get set</li> <li>- Go execute integration to process</li> </ul> </li> <li>• Develop a guide to aid future design and development of the website services in order to maintain best practice and consistency.</li> </ul>



# Digital Services Initiatives - continued

Initiative	Description	Key Activity
2.2 Design & develop prototype functional design templates	<p>Create a standard forms approach and templates for the new website.</p> <p>Build microservice functionality:</p> <ul style="list-style-type: none"> <li>• Electronic signature, online payments, online document submission, document management</li> </ul>	<ul style="list-style-type: none"> <li>• Review all web forms and prioritize them for conversion to a standard approach in order to complete and submit them electronically.</li> <li>• Applies principles &amp; approaches to data management developed in <b>Initiative 4.1 Establish master data management approach for digital services.</b></li> <li>• Create microservice functional capabilities for electronic signature, online payments, online document submission and records archiving.</li> <li>• Convert all external-facing PDF forms into dynamic content forms.</li> <li>• Integrate these services into specific forms required by target services.</li> </ul>
2.3 Front-end services design: register, apply, request, refund, account open/close	<p>Build, test and implement the first cluster of web services designed in <b>Initiative 1.4: Develop detailed requirements for digitalization of prioritized services</b></p>	<ul style="list-style-type: none"> <li>• Build services associated with the following service types <ul style="list-style-type: none"> <li>- Register</li> <li>- Apply</li> <li>- Request</li> <li>- Refund</li> <li>- Account Open/Close</li> </ul> </li> <li>• User test services</li> </ul>
2.4 Front-end services design: workflow, status, notification	<p>Build, test and implement the second cluster of web services designed in <b>Initiative 1.4: Develop detailed requirements for digitalization of prioritized services</b></p>	<ul style="list-style-type: none"> <li>• Build services associated with the following service types <ul style="list-style-type: none"> <li>- Status/Notification</li> <li>- Workflow: approvals, permits, registration, integration with core systems</li> </ul> </li> <li>• User test services</li> </ul>

# Digital Services Initiatives - continued

## Workstream 3: Technology Modernization

Initiative	Description	Key Activity
3.1 Declare core systems and establish decommission strategy	Finalize a decommissioning strategy and timeline to reduce duplication of application functionalities.	<ul style="list-style-type: none"> <li>Evaluate the impact and technical, business and budgetary requirements for decommissioning of targeted applications.</li> <li>Determine a migration strategy/plan for the migration to a standard set of core enterprise applications.</li> <li>Create decommissioning strategy and roadmap.</li> </ul>
3.2 Decommission identified systems aligned to roadmap deployment	Execution of the strategy and plan developed in <b>Initiative 3.1. Declare core systems and establish decommission strategy</b>	<ul style="list-style-type: none"> <li>Roadmap stages for best practice migration to new enabling technology.</li> <li>Allocate and budget resources to support the transition.</li> <li>Integrate roadmap objectives into Executive performance objectives.</li> </ul>
3.3 Procure new technology applications and services	The objective of this initiative is to evaluate, procure and implement the technology solutions and services to enable the digitalization initiatives.	<ul style="list-style-type: none"> <li>Consider the options available and identify business as well as requirements that will enable the technical and business needs.</li> <li>Lay out the possible options for external support of not only supporting technology but development and maintenance as well.</li> <li>Define the extent of and use of externally supported infrastructure and services requiring procurement.</li> </ul>

# Digital Services Initiatives - continued

## Workstream 4: End-to-end Digital Service Delivery

Initiative	Description	Key Activity
4.1 Establish master data management approach for digital services	Finalize a Master Data Management plan for the current and future online services to be transformed by the digitalization strategy.	<ul style="list-style-type: none"> <li>Establish the associated vision, principles, objectives.</li> <li>Create a guide for the data collection requirements for dynamic forms.</li> <li>Integrate into forms being developed by <b>Initiative 2.2. Design and develop prototype functional design templates.</b></li> </ul>
4.2 Service digitalization group 1: online forms, attachments and data capture	Provide technology enablement of forms and services being designed by <b>Initiatives 2.2. Design and develop prototype functional design templates and 2.3. Front-end services design: group 1</b>	<ul style="list-style-type: none"> <li>Provide process transformation and technical support for build services associated with the following services types                             <ul style="list-style-type: none"> <li>Register</li> <li>Apply</li> <li>Request</li> <li>Refund</li> <li>Account Open/ Close</li> </ul> </li> <li>Online forms, attachments, data capture</li> </ul>
4.3 Evolve resident portal to be single access to all authenticated services	Create a common web portal entry with single sign-on and any required authentication process to provide for a “one stop” location to access Region of Peel online portals.	<ul style="list-style-type: none"> <li>Build single sign-on capability.</li> <li>Establish ability to pre-populate common data fields from a user profile to enhance customer ease of use.</li> <li>Standardize branding for integrated portal elements.</li> </ul>

# Digital Services Initiatives - continued

Initiative	Description	Key Activity
4.4 Service digitalization group 2: integrations and field updates	Provide technology enablement of forms and services being designed by <b>Initiatives 2.2. Design and develop prototype functional design templates and 2.3. Front-end services design: register, apply, request, refund, account open/close</b>	<ul style="list-style-type: none"> <li>• Provide process transformation and technical support for build services associated with the following service types               <ul style="list-style-type: none"> <li>- Status/Notification</li> <li>- Workflow - approvals, permits, registration</li> <li>- integration and field updates with core systems and case objects</li> </ul> </li> </ul>
4.5 Service digitalization group 3: case management, workflow and notification	Provide technology enablement of forms and services being designed that require case management, workflow and status chain notifications for complex service processes.	<ul style="list-style-type: none"> <li>• Provide process transformation and technical support for build services associated with the following service types               <ul style="list-style-type: none"> <li>- Case management/ticketing</li> <li>- Complex case workflow</li> <li>- Multi-step approvals</li> <li>- Integrations with other supporting systems</li> <li>- Notifications</li> </ul> </li> </ul>
4.6 Service digitalization group 4: replace paper, digitize and archive	Provide technology enablement of forms and services being designed that require archiving and storage of documents and files.	<ul style="list-style-type: none"> <li>• Provide process transformation and technical support for build services associated with the following service types               <ul style="list-style-type: none"> <li>- Replace paper</li> <li>- Digitize and archive</li> </ul> </li> </ul>

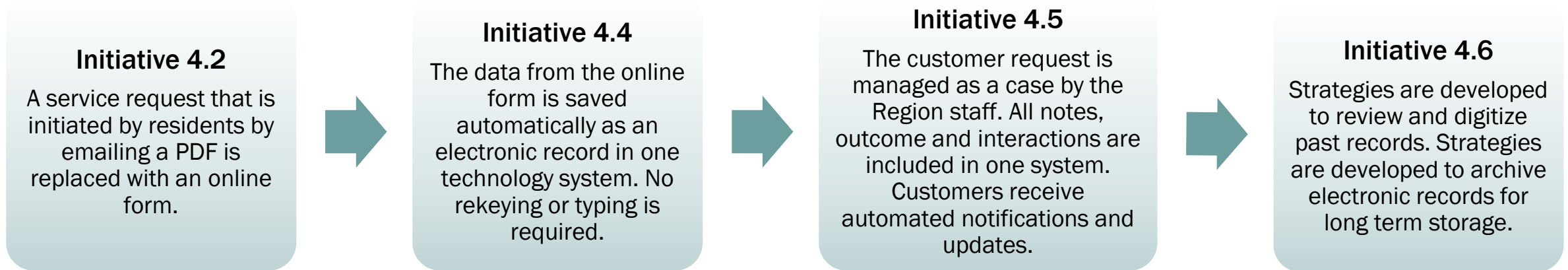
# Staging the Roadmap Implementation

## *How a service gets digitalized across the roadmap*

The Digital Services Roadmap includes four service digitalization initiatives where services will be updated and digitalized in a step approach. Each initiative is focused on implementing a key set of digitalization improvements, with efficiencies and customer service benefits becoming available at each step.

The four service digitalization initiatives are:

- Initiative 4.2. Online forms, attachments and data capture is implemented
- Initiative 4.4. Integrations and field updates implemented
- Initiative 4.5. Case management, workflow and notification implemented
- Initiative 4.6. Replace paper, digitize and archive implemented





## Cost Savings & Benefits

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*Digitalization will lead to improved information security and privacy, better data quality, records management, and service integration optimized across departments.*

# Cost Savings Potential

The Digital Services Roadmap will transform Region of Peel into a digital leader in public services delivery. The Digital Services Roadmap put forth is transformative. Benefits will be felt by all stakeholders through improved service delivery and outcomes, improved service delivery efficiency, improved use of technology and the ability to scale services without the need to add more resources.

The process improvement, strengths, issues, opportunities and challenges analysis and the development of the Digital Services Roadmap, identified a series of benefits. These are either qualitative or quantifiable benefits which have been estimated as potential efficiencies or cost savings. A structured approach was used to estimate the savings potential by each target service and the supporting IT infrastructure.

## Analysis Approach

The analysis involved four key activities:

- Identification and review of services that lend themselves to digitalization that will deliver material efficiencies or cost reductions.
- Development of a high-level cost proxy to deliver the services. The proxy estimated the end-to-end process of each identified service using readily available Region of Peel finance information.
- Projection of potential savings gained through process improvements, IT technologies optimization and work-load reduction and reallocation.
- Alignment of potential benefits (reported as cost savings) to the Digital Services Roadmap.

Representatives from the project team, finance team, service areas, and functional support areas, including Information Technology, were consulted to confirm and validate the data utilized and the approach taken in the analysis.

# Savings Potential per year

The services assessed were categorized by the potential to yield digitalization cost savings either through quantifiable efficiencies or direct cost savings. The Project Team reviewed 105 services provided by the Region in 2019. After consultation with Region of Peel staff, these 105 services were reduced to those with a potential for cost savings and those with more than 220 transactions conducted per year. Services that were already fully digitalized, had inflight digitalization projects, or were identified by the business area as not suitable were excluded from the estimate savings potential.

Leveraging the service process review conducted in the Current State analysis, services with potential were examined to identify quantifiable efficiencies through process improvements, improved system integration, automation of workflows and channel migration. Depending on the depth of analysis conducted, the services have been grouped into analysis confidence segments.

	\$ Quantifiable Efficiency Potential (Annual)	Description
High-Confidence Targets (15)	\$1,320,728	In-depth service process review (including sample current and future state process mapping). Specific cost savings estimates developed.
Mid-Confidence Targets (15)	\$709,418	Full process walk through - no detailed process mapping; process improvements identified. Specific cost savings estimates developed.
Low-Confidence Targets (11)	\$229,637	Lower digitalization savings potential services that had over 220 transactions per year. A proxy of savings per transaction was utilized to estimate cost savings potential. Services hold digitalization promise and are similar enough to High/ Mid-Confidence Targets to potentially yield savings. A proxy of 50% of the Mid-Confidence cost / transaction is used.
<b>TOTAL</b>	<b>\$2,259,783</b>	

An additional \$325,311 per year of IT cost reductions through application decommissioning have been identified. A listing of applications considered for retirement/ removal is included in this report. The project team also examined opportunities to reduce other hard assets including real estate and document storage costs. With no clear path to extract these benefits over the term of the Roadmap, no cost savings potential from hard assets was included in the estimates.



# Savings Aligned to Digital Services Roadmap

The potential total cost savings identified include both direct cost reductions and quantifiable efficiency gains. Over a 5-year period the total cost savings potential benefit is **\$6,731,505**. The 5-year timeline was chosen to provide a reasonable period to capture savings. The transformative changes put forth in the Roadmap do not come fully in force until after three years. When fully implemented, the digitalization efforts should yield approximately **\$2,585,094** of recurring efficiency and direct cost savings per year.

Analysis focused on the potential to capture service delivery efficiencies and corresponding IT technology asset reductions through optimization efforts. The savings identified are predominately recurring on an annual basis as the reengineered digital processes allow for ongoing benefit capture and the ability to scale operations with only limited incremental cost.

## Savings Potential by Year

Savings Potential Category	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Quantifiable Efficiencies	--	\$778,654	\$803,631	\$2,130,462	\$2,259,783	\$5,972,530
Cost Savings – IT technologies optimization	--	\$29,615	\$78,738	\$325,311	\$325,311	\$758,975
<b>TOTAL</b>	--	\$808,269	\$882,369	\$2,455,773	\$2,585,094	\$6,731,505

All estimates are conservative

# Qualitative Benefits

Cost savings are not the only benefit expected from the Roadmap proposed.

Customer service will be improved by:

- Making service access more convenient through the enhanced use of digital devices (e.g., smart phones, tablets, desktops) commonly used by residents and businesses.
- Decreasing the turn around time for a transaction by improving information intake, optimizing workflow, feedback/ status update mechanisms and improved cross department service integration by using case management approaches and tools.
- Automating simple tasks and feedback mechanisms using new technologies so residents can readily get updates to simple and common requests, either proactively or quickly with an ad hoc request.
- Process transparency, residents will know where they are in a process and how long it should take to get a resolution.
- Designing processes that notify residents where they are in a process and how long it should take to get a resolution.
- Businesses will be able to take on tasks to expedite requests by using self-service tools to start a transaction and provide additional documents in a safe and timely fashion.

Organization support will be improved by:

- Moving data from analogue to a digital format will support the standardizations and automation of records management across the organization improving data security, retention compliance, and access audits.
- Staff will have seamless and secure access to the information required to do their jobs in the field and all service delivery locations.
- Workflows will be optimized and automated where possible to move transactions quickly through the required process with the ability to track status and expedite bottlenecks.
- Staff will no longer need to rekey data across systems, removing repetitive, error prone tasks from the process, improving data quality & security.
- Digital signatures and online payment tools will improve access and convenience to customers and improve compliance and payment clearance rates.

## Next Steps and Considerations

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# In-flight Project Considerations

*Key areas for consideration due to potential impact on service modernization*

The implementation approach of current and proposed projects across the Region of Peel that are outside of the scope of this modernization project need to be considered in order to implement a consistent Region-wide customer experience and service design blueprint.

Factor	Consideration
Multiple portals planned for implementation. Accounts will not be common across the portals.	Customers will be required to setup and manage accounts for each portal. Leading practices and Region residents indicate a preference for a single sign-on approach to portals and online services.
Web redesign – Information Management	The planned website redesign is using a department-centric approach to presenting and organizing information and services. Leading practices demonstrate higher customer adoption rates by organizing the information on government websites using a customer-centric approach to categorizing and presenting information and services.
Maximo implementation (replace Hansen with Salesforce and Maximo)	Implementation should provide an opportunity to integrate with Salesforce case management and to update the fields captured in the systems; removing the need for storing additional information in external databases and spreadsheets.
Dependencies with external applications	Some service delivery processes involve external agencies, which may hinder the ability to digitalize the service. Data sharing agreements with partners should include integration standards that are enabled by modern core applications.
Waste Management, Paramedics, TransHelp upgrades, PAMA AMS	In-flight projects and project requests should be reviewed at a program management and enterprise level for interdependencies and synergies.
Funding model	The current funding model of IT charge backs to the departments inhibits the use of core Regional applications and prevents an integrated view of the customer and single source of data.

# Critical Success Factors

Based on previous experience and relevant successful leading practices, a number of critical success factors were identified.

- Develop an executive governance structure that allows for rapid decision making capability.
- Create a Project Management Office approach to rapidly complete the foundational initiatives and accelerate time to benefit.
- Support the Advancing Digital Strategy Initiatives with a centralized funding approach that enables Build / Maintain / Enhance aspects.
- Obtain business unit commitment to an enterprise approach to designing and delivering digital services, which includes adopting common process standards and replacing department "point solutions" with enterprise-wide core applications where duplicate capabilities exist.
- Staff the foundational initiatives with a “best and brightest” approach using a blend of internal and external expertise.
- Schedule structured review cycles using a “Review -> Reset -> Move Forward” approach.
- Accelerate the Web Services Stream to coincide with the new Region of Peel website project.
- Make use of tactical Change Management & Communications approaches throughout the program timeline.
- Maintain a user-centric approach as a fundamental guiding principle focused on residents in front-end design as well as end-user staff for back-end design.



# Conclusion

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# Looking to the Future

The Region of Peel is well positioned to be a digital services leader in the public sector. It has a committed team of leaders driving the changes required. Projects in flight combined with the new initiatives identified in the Digital Service Roadmap will enable the Region to achieve its vision.

As with all transformative change initiatives, significant work remains. Of critical importance will be setting in place an empowered enterprise Digital Services Transformation governance and program management model, properly funding the initiatives and putting in place the foundational initiatives that allow continuous enhancements and service improvements.

Seventeen high priority initiatives were developed, in consultation with staff, that will lead to improved service delivery to residents, improved tools and support for staff, optimized service processes and cost savings and efficiencies.

As shown through the resident consultations, there is an unfilled desire for more and better digital services. Moving forward quickly is now essential.



# Appendix - Service Catalogue

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# Service Listing

The following list of services are included in the Service Catalogue and were included in the assessment for this project:

Department	Division	Service Name
Corporate Services	Clerk's	Freedom of Information Request
Corporate Services	Loss Management	Claim property damage or bodily injury
Corporate Services	Loss Management	Report damages due to sewer back-up
Health Services	Paramedics	AED Follow-ups
Health Services	Paramedics	AED Registration & Information Update
Health Services	Paramedics	Paid Duty Paramedic request
Health Services	Paramedics	Peel Regional Paramedic Neighbourhood Outreach
Health Services	Paramedics	Request Your Ambulance Call Report
Health Services	Communicable Disease	Book your immunization appointment
Health Services	Communicable Disease	Report a non-medical immunization exemption
Health Services	Communicable Disease	Report Immunizations
Health Services	Communicable Disease	Report Stagnant Water

Department	Division	Service Name
Health Services	Family Health	Make an appointment at a baby feeding clinic
Health Services	Family Health	Receive Public Health Nurse telephone support
Health Services	Family Health	Register for Healthy Babies Healthy Children program
Health Services	Family Health	Register for prenatal classes
Health Services	Family Health	Register for prenatal eLearning
Health Services	Family Health	Register for the breastfeeding companion peer support program
Health Services	Health Protection	Business Reporting Form
Health Services	Health Protection	Food Handler Certification
Health Services	Health Protection	Inspection Request / Complaint
Health Services	Health Protection	Property Information Request Form

# Service Listing

The following list of services are included in the Service Catalogue and were included in the assessment for this project:

Department	Division	Service Name
Health Services	Health Protection	Recreational Water Facility Opening
Health Services	Health Protection	Report Food Poisoning
Health Services	Health Protection	Report New Business
Health Services	Health Protection	Special Event Permits
Health Services	Health Protection	Well Water Testing
Health Services	Mass Vaccination Program	Book your COVID-19 vaccination appointment
Health Services	Oral Health	Children's Dental Services
Health Services	Oral Health	Senior's Dental Services
Health Services	Public Health	Register for Healthy Pledge Program
Health Services	Public Health	Apply to volunteer in Health Services
Human Services	Children's Services	Appeal a child care subsidy decision
Human Services	Children's Services	Apply for Child Care Subsidy

Department	Division	Service Name
Human Services	Children's Services	Report changes to an existing child care subsidy
Human Services	Children's Services	EarlyON
Human Services	Children's Services	Peel Inclusion Resource Services (PIRS)
Human Services	Community Access	Apply for Ontario Works
Human Services	Community Access	Get help paying for funeral arrangements
Human Services	Community Access	Help for people with disabilities
Human Services	Community Access	Update your Ontario Works information
Human Services	Community Partnerships	Community Investment Program (CIP)
Human Services	Community Partnerships	Affordable Transit Program (ATP)
Human Services	Housing Development Office	Providing funding for developers to build middle-income rental housing in Peel

# Service Listing

The following list of services are included in the Service Catalogue and were included in the assessment for this project:

Department	Division	Service Name	Department	Division	Service Name
Human Services	Housing Support	Housing Stability Fund (HSP) & Homelessness Prevention Fund (HPF)	Public Works	Operations Support	Initiate an owner-initiated local improvement
Human Services	Peel Living	Report changes to Peel Living	Public Works	Operations Support	Report a construction project concern / request information
Human Services	Peel Living	Tenant Bookings	Public Works	Environmental Education	Residential Rat Control Program
Human Services	Peel Living	Tenant Maintenance	Public Works	Water Billing	Change Water Billing Account
Human Services	Housing Support	Appeal a housing eligibility decision	Public Works	Water Billing	Get your bill
Human Services	Housing Support	Apply for subsidized housing	Public Works	Water Billing	Move to or from a new location
Human Services	Housing Support	Find a shelter	Public Works	Water Billing	Pay Water Bill
Human Services	Housing Support	Keep waitlist information updated	Public Works	Water Billing	Water Meter Inspection
Public Works	Development Services	Apply for development permission	Public Works	Planning	Request for air photos of the Region of Peel

# Service Listing

The following list of services are included in the Service Catalogue and were included in the assessment for this project:

Department	Division	Service Name
Public Works	TransHelp	Appeal a Decision
Public Works	TransHelp	Apply for TransHelp
Public Works	TransHelp	Book or Change a Trip
Public Works	TransHelp	Buy Taxi Scrip
Public Works	TransHelp	Complaint/refund request
Public Works	TransHelp	Make a Payment
Public Works	TransHelp	View or Cancel a Trip
Public Works	Transportation	New driveway request
Public Works	Transportation	Request a road permit
Public Works	Transportation	Pedestrian signal complaint
Public Works	Transportation	Request a new traffic light
Public Works	Waste Management	Dispose of Business Hazardous Waste
Public Works	Waste Management	Purchase Bag Tags

Department	Division	Service Name
Public Works	Waste Management	Report Missed Collection
Public Works	Waste Management	Request medical waste exemption
Public Works	Waste Management	Request printed waste material
Public Works	Waste Management	Request walk-up service
Public Works	Waste Management	Request Waste Cart Exchange
Public Works	Waste Management	Request Waste Cart Service (repair)
Public Works	Waste Management	Request waste collection for move out
Public Works	Waste Management	Request waste collection for special event
Public Works	Waste Management	View Collection Calendar
Public Works	Waste Management	Weekly Waste Reminders
Public Works	Water & Wastewater	Report a sanitary sewer problem
Public Works	Water & Wastewater	Sanitary Backwater Valve Rebate Program
Public Works	Water & Wastewater	Drinking water lead testing

# Service Listing

The following list of services are included in the Service Catalogue and were included in the assessment for this project:

Department	Division	Service Name
Public Works	Water & Wastewater	Report a Problem with Water (service or quality)
Public Works	Water & Wastewater	Request Water Locates
Public Works	Water & Wastewater	Request Water Turn Off / On
Public Works	Water & Wastewater	Restoration requests
Service Excellence & Innovation	PAMA	Apply for the Creative Expressions program
Service Excellence & Innovation	PAMA	Become a PAMA member / renew membership
Service Excellence & Innovation	PAMA	Book a birthday party
Service Excellence & Innovation	PAMA	Book a corporate workshop
Service Excellence & Innovation	PAMA	Book a school program
Service Excellence & Innovation	PAMA	Book a seniors outreach session
Service Excellence & Innovation	PAMA	Book a tour

Department	Division	Service Name
Service Excellence & Innovation	PAMA	Donate to PAMA
Service Excellence & Innovation	PAMA	Purchase a corporate gift
Service Excellence & Innovation	PAMA	Purchase a PAMA gift
Service Excellence & Innovation	PAMA	Rent PAMA space
Service Excellence & Innovation	PAMA	Volunteer at PAMA

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