

Draft

Client-Centric Services

Joint Councils
February 21, 2018

Purpose

- Confirm the next steps for the Client-Centric Services Maturity Model based on FPTM consultations.
- Confirm the next steps for the priority overall.

Client-Centric Services put client needs and expectations at the core of service design and decision making. Thinking of the interjurisdictional experience of the client upfront will help us respond better to their needs.

Background

- Client-Centric Services was identified as a priority of the Joint Councils in 2017 as part of the Framework Working Group Exercise.
- In October 2017, a draft Maturity Model (**Annex A**) was presented to the Joint Councils as a starting point to suggest ways to make Joint Council initiatives more client-centric.
 - Members agreed that the model provided direction for current and future initiatives to be more client centric.
 - Members asked that the model be validated with jurisdictions.
- The Model is aspirational; it provides a continuum of the types of services clients want governments to be working towards.
 - Client convenience, digital service, client engagement and co-design feature prominently in the model.

Consultation Design

- Leads for the Client-Centric Services priority met with all jurisdictions to seek their views on the model and advice for moving forward.
- Jurisdictions/members were asked:
 - What was the initial reaction of participants to the maturity model?
 - How could it inform their work?
 - How could it be improved?
 - What were their views on a Client-Centric Services Playbook?
- Validation against public opinion research, e.g., Citizens First Survey and ESDC's Client Experience Survey, was undertaken to ensure that the model reflected client views. Overall, all major ideas of this research are reflected in the model; however, the surveys also measured the importance of frontline interactions and specific channel satisfaction.

Members were extremely supportive of the maturity model as a way to guide interjurisdictional collaboration and ensure initiatives remain aspirational and focused on the client rather than on a siloed approach.

What We Heard:

Consultations on the Maturity Model

Positive Aspects	<p><i>The Maturity Model can help focus the work of the Joint Councils by:</i></p> <ul style="list-style-type: none"><i>• Promoting common understanding of client-centric principles and attributes;</i><i>• Anticipating client expectations and perspectives; and</i><i>• Providing a continuum for all service organizations to work towards.</i>
Challenges	<p><i>In applying the Maturity Model, Joint Councils need to be aware that it may:</i></p> <ul style="list-style-type: none"><i>• Set expectations too high (especially for smaller service organizations and jurisdictions).</i><i>• Require resources that are not easily available.</i><i>• Need some legislative or policy changes to be able to advance along the continuum e.g. sharing of client information.</i>

Members stressed the importance of engaging with clients on all the initiatives undertaken by the Councils to ensure that they reflect what clients want.

What We Heard:

Client-Centric Services Playbook

- In Charlottetown, members asked the leads to explore if a Playbook could help make Joint Councils initiatives more client-centric.
- It is recommended that a Playbook not be pursued. While some positive views were expressed, the following concerns were raised:
 - Efforts should be focused on applying the maturity model and identifying initiatives that are most directly linked to client-centric services.
 - Jurisdictions already have resources, e.g. BC Playbook, which are specifically designed for their needs. These can be shared with members.

What's Next:

Consultations on the Maturity Model

- Jurisdictions want to finalize the Model and concentrate on the initiatives that can move client-centric services along the continuum. A few minimal improvements will be made to complete the Maturity Model:
 - The Model needs to be framed to ensure it is clear that it is an aspirational model to better manage expectations.
 - More rigor is required to ensure it is evidence-based and written in the voice of clients.
 - The Model could be applied to Joint Councils' priorities to understand its usefulness. The Maturity Model has been shared with Davis Pier, the consultant conducting the journey mapping for the Death Notification initiative.
- Insights from the lines of inquiry above should provide a good working document to ensure that future Joint Councils initiatives are client-centric.

Moving Beyond the Maturity Model

- It is proposed that the working group begin focusing on project-based initiatives that can improve clients' experiences.
 - There is an opportunity to build upon the PSSDC Service Integration Workshop that took place in Charlottetown.
 - A number of common areas of interest that could make services more client-centric were identified at this workshop (**Annex B**). Such initiatives would improve the responsiveness and accessibility of government services.
- The Client-Centric Services Working Group could join up interested jurisdictions, injecting new people and resources to advance common initiatives. For example:
 - A scan of PSSDC collaboration opportunities identified two areas where FPTMs may want to collaborate: a common benefits and services finder and alternative means of receiving benefits.

Expanding the initiatives under Client-Centric Services beyond Death Notification could be done in collaboration with PSSDC, which will be considering future areas of collaboration.

Next Steps

- Make minor revision to the Maturity Model to reflect members' comments.
- Facilitate the development of client-centric project-based initiatives with interested partners (e.g. Service and Benefits Finder).

Discussion Question

- Are there any initiatives which the Joint Councils should focus on pursuing to work towards more Client-Centric Services e.g. Service and Benefits Finder?

"The citizen is at the centre of everything"

RESULTS








My expectations on how I access services across governments are considered.

My needs are anticipated across levels of government.

My service needs that cross governments are simple and straightforward.

My needs are resolved at first contact no matter the level of government.

I can access services seamlessly across jurisdictions and channels.

ATTRIBUTES	SERVICES ARE MEETING SOME OF MY EXPECTATIONS	I AM SATISFIED	I AM IMPRESSED BY THE QUALITY OF SERVICE I AM RECEIVING
 EASY ACCESS AND ACCESSIBLE	<ul style="list-style-type: none"> My in-person services are conveniently located in one location where possible. I can choose the channel that suits me the best (e.g. online, in-person, over the phone). I can receive accessible services when I ask for them. 	<ul style="list-style-type: none"> My services are bundled and connected across departments and jurisdictions (e.g. birth bundle, death bundle). Accessible services are readily available before I ask. I can access a service via one channel and seamlessly finish it via another. 	<ul style="list-style-type: none"> I can interact with my service providers anywhere, anytime, on any device. My service needs are met at the first point of contact. All of my issues are resolved at the first point of contact. I receive accessible services following universal design standards from all the jurisdictions and channels.
 CONSISTENT	<ul style="list-style-type: none"> My services are reliable across channels. My services adequately meet my expectations regardless of channels. 	<ul style="list-style-type: none"> I receive consistent information about the services I need across governments and jurisdictions. Changes I make at one level of government are reflected across levels of government (e.g. address change). 	<ul style="list-style-type: none"> The quality of services I receive consistently exceeds my expectations. I receive the same high level of service across jurisdictions. I receive service that has been tested with important stakeholders to ensure it surpasses service standards.
 EFFICIENT	<ul style="list-style-type: none"> My information is used within a jurisdiction to make it easier for me to receive related services. When I engage in a service, I know how long it will take, what documents I will need, and when I will receive a service. My services are timely and affordable. 	<ul style="list-style-type: none"> My service providers anticipate my needs based on my life events and suggest appropriate interjurisdictional services (e.g. high school graduate receives nudge to access student loans, bursaries, labour market information, skills training opportunities, etc.). My information is shared as appropriate between different levels of government to reduce the need for me to tell it more than once. 	<ul style="list-style-type: none"> My governments anticipate the services I need and recommend other related services to improve my life. Jurisdictions are delivering services together to improve client experiences in an efficient manner.
 RESPONSIVE	<ul style="list-style-type: none"> My feedback is actively sought. The information and feedback I give is used to improve the services I receive. 	<ul style="list-style-type: none"> My service providers provide opportunities for people like me to co-design the services I need. My service providers actively engage people like me to test services before launching to ensure it meets our needs. My governments inform me how my feedback improved services I received. 	<ul style="list-style-type: none"> My service providers use sophisticated methods to continually evaluate and explore better ways of delivering services to me (e.g. advanced data analytics). I co-design services with my governments.
 INTEGRITY	<ul style="list-style-type: none"> I am confident that my governments are delivering services that Canadians need while reducing fraud. 	<ul style="list-style-type: none"> My governments are working together to ensure benefits are targeting only those who need them. My governments are ensuring everyone who should be receiving benefits is targeted. 	<ul style="list-style-type: none"> My taxes are well spent; jurisdictions are working together to improve services, sharing information to identify fraud, and removing opportunities to commit fraud, thereby improving Canadian confidence in government.
 SECURE	<ul style="list-style-type: none"> Jurisdictions consistently save and protect my information in all channels. 	<ul style="list-style-type: none"> I can give my consent to allow jurisdictions to share my information to further improve my services. Jurisdictions are using a secure systematic approach to enable me to access services across channels and jurisdictions. 	<ul style="list-style-type: none"> I have access to secure and seamless online service across service organizations. I have a single secure login for all of my online services and I am able to check the status online for all services.
 SIMPLE	<ul style="list-style-type: none"> My services are delivered in easy to understand, plain language. My services are easy to use and process is easy to determine. 	<ul style="list-style-type: none"> Information I provide is pro-actively used for related services. Data entry fields are pre-populated with data that could reside in other jurisdictions. 	<ul style="list-style-type: none"> My services are simplified using a common look and feel across governments. My experience is personalized using my information to meet my unique needs.

Service Integration Workshop

Partnership Opportunities

- Benefits and services finder (ON, BC, VAC, NWT, ESDC, MSDO)
- One account (IRCC, SK, YK, NWT, CRA, ESDC)
- Alternative means of receiving benefits (ON, AB, ESDC)
- Auto enroll (MB)
- Integrated payment processing (AB, ESDC)
- Service bundling e.g. address change (MB, CRA, VAC, NS, ON)
- Client focused design (NWT, NS, NB, YK, SK, MSDO)
- Expanding rural & remote pilots (NWT, ON, MSDO, IRCC, ESDC)
- Liaison services through community partnerships (MSDO)
- Increasing in-person access (co-location, cross promotion, joint outreach) (ON, NB, QC, ESDC)

Service Delivery Innovation

- Mobile App (MB, INAC, NB)
- Chatbot (MSDO, IRCC, VAC)
- Single Client View (MB, BC, AB)
- Video Chat (BC, MSDO, NS)
- Live Chat (BC, MB, NS, NWT, MSDO, VAC)
- Save and Retrieve (YK)
- Integrated Service Management (NB)
- SMS Text (BC, NB)

Issues Management

Common issues that could benefit from collaboration:

- Indigenous Service Delivery
- Social Change Taskforce (Gender)
- Crisis Management
- Accessibility