

DRAFT MINUTES

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**TOWN OF APEX
TOWN COUNCIL WORK SESSION
TUESDAY, JUNE 20, 2023
3:30 P.M.**

5 The Apex Town Council met for a work session on Tuesday, June 20, 2023 at 3:30 p.m. at the
6 Apex Town Hall located at 73 Hunter Street in Apex North Carolina.

7 This meeting was open to the public. Members of the public were able to attend this
8 meeting in-person or watch online via the livestream on the Town's YouTube Channel:

9 <https://www.youtube.com/watch?v=PSWZ9vNnsHg>

10

11 **[ATTENDANCE]**

12
13 Elected Body

14 Mayor Jacques K. Gilbert (presiding)

15 Mayor Pro-Tempore Audra Killingsworth

16 Councilmember Brett Gantt

17 Councilmember Ed Gray

18 Councilmember Terry Mahaffey

19 Councilmember Arno Zegerman (left the meeting early - see note in the minutes)

20 Absent: None

21
22 Town Staff

23 Town Manager Catherine Crosby

24 Deputy Town Manager Shawn Purvis

25 Assistant Town Manager Demetria John

26 Assistant Town Manager Marty Stone

27 Town Attorney Laurie Hohe

28 Town Clerk Allen Coleman

29 Deputy Town Clerk Ashley Gentry

30 Information Technologies Director Erika Sacco

31 All other staff members will be identified appropriately below.

32

33 **[COMMENCEMENT]**

34 **Mayor Gilbert** called the meeting to order at 3:36 p.m. and led the Pledge of
35 Allegiance.

36 **Town Manager Crosby** said the meeting today was simply a status update for
37 Council, and all of the projects would need to come back to Council in the future.

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1 [ITEM NO. 1 - ADVANCED METERING INFRASTRUCTURE (AMI) UPDATE]

2 **Assistant Town Manager Stone** gave updates regarding the AMI upgrade. He said
3 they hope to have a contract in place within the next month. He said his team has worked
4 really hard on getting terms that are good for the town. He said once the contract is in place,
5 they will begin implementing infrastructure improvements and testing the meters to ensure
6 accuracy, before rolling them out to utility customers.

7 **Councilmember Gantt** asked if the new builds in the past two years have had these
8 installed.

9 **Assistant Town Manager Stone** said what has been put on those builds has been
10 completely different technology from this. He said this new technology will no longer require
11 the drive by, he said the actual water meters will still be compatible, but they will need to
12 replace the electronic components in the older models to have them work with the AMI. He
13 said all components would need to be switched out for electric meters.

14 **Councilmember Mahaffey** said this sounds like a big project, and asked if the town
15 would be able to get 26,000 meters.

16 **Assistant Town Manager Stone** said once the contract goes through, it would be
17 about 12 months before rollout is able to begin to allow time to get the base system running
18 and have everything get verified. He said after that, it would be a two-year (or less) process to
19 get all of the units switched out. He said contractually the vendor would have to be done
20 within that two-year window after system verification.

21 **Councilmember Zegerman** asked if that would mean the total time was two years
22 from when the contract was signed.

23 **Assistant Town Manager Stone** said it would be two years from when the system was
24 accepted by the town, which would mean about three years total from when the contract was
25 signed.

26 **Councilmember Mahaffey** said that didn't sound that bad to him, and that he would
27 be worried if this was something that could take up to a decade.

28 **Assistant Town Manager Stone** said the delay for this project ended up being good
29 because it allowed time for IT to work out the Enterprise Resource Planning (ERP) system.

30 **Councilmember Mahaffey** wanted to clarify that currently the drive by system was
31 able to read the meter electronically, and that is wasn't a proprietary technology.

32 **Assistant Town Manager Stone** said all systems are proprietary, this is just a different
33 vendor with a different technology.

34 **Councilmember Mahaffey** asked if these would be compatible with each other as it
35 was rolling out, or if there would be a need to track which customers had which system and
36 use different methods for both.

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1 **Assistant Town Manager Stone** said there will be a meter data management system
2 on the next Council agenda, and that would help in organizing the data from the different
3 sources to allow it all to be integrated into the new ERP.

4 **Councilmember Gantt** wondered if people would be notified when meter switch outs
5 would be occurring, so they weren't scared by someone coming to their home unexpectedly.

6 **Assistant Town Manager Stone** said there will be a whole communication plan
7 before the meter rollout happens with all of that information.

8

9 **[ITEM NO. 2 - ENTERPRISE RESOURCES PLANNING SYSTEM (ERP) UPDATE]**

10 **IT Director Erika Sacco** gave an overview presentation regarding the Enterprise
11 Resource Planning (ERP) Assessment Project

12 **[ERP - SLIDE 1]**

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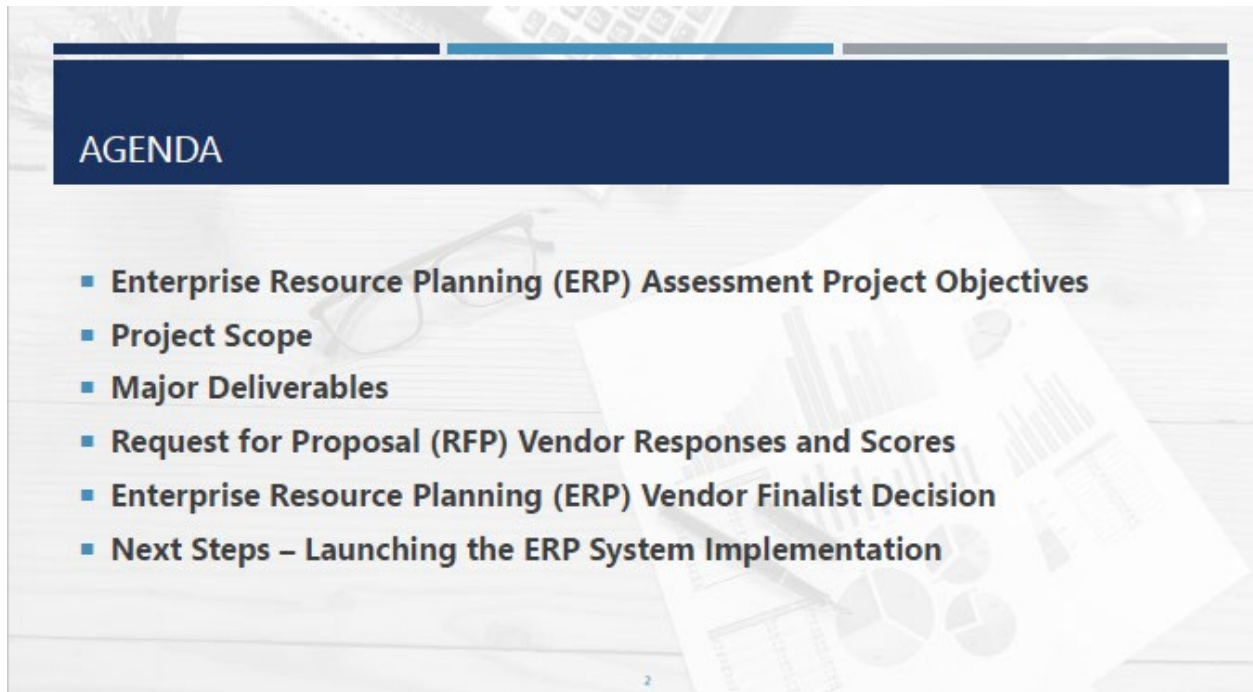
**Enterprise Resource Planning (ERP) Assessment Project
Overview - JUNE 20, 2023**



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1 [ERP - SLIDE 2]



AGENDA

- Enterprise Resource Planning (ERP) Assessment Project Objectives
- Project Scope
- Major Deliverables
- Request for Proposal (RFP) Vendor Responses and Scores
- Enterprise Resource Planning (ERP) Vendor Finalist Decision
- Next Steps – Launching the ERP System Implementation

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3 [ERP - SLIDE 3]



TOWN OF APEX ERP ASSESSMENT
OVERALL PROJECT OBJECTIVES

- Develop business & technical requirements
- Define scope of the new ERP system
 - *What current systems will be replaced/what systems will be kept*
- Identify feasible vendors
- Develop and Issue Request for Proposal (RFP)
- Short List Desired Vendors and Conduct Demonstrations
- Select Finalist Vendor
- Negotiate and Execute Contract with Finalist Vendor

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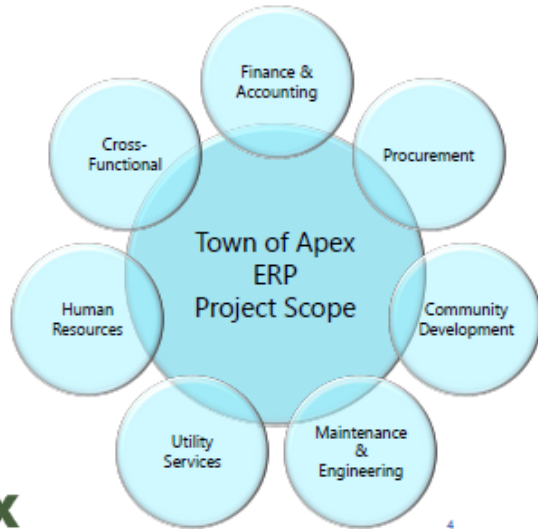
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1 [ERP - SLIDE 4]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: MAJOR FUNCTIONAL AREAS



- *These functional areas do not map 1:1 with the Town's departments*
- *Multiple departments will share the system's capabilities in these areas*
- *Time to break the silos*

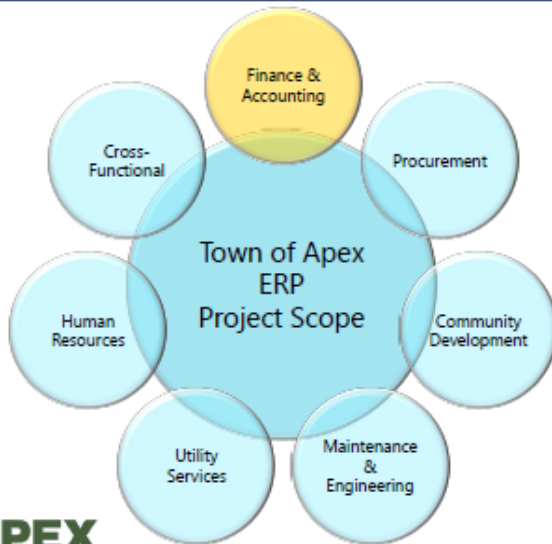


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3 **Councilmember Zegerman** left the meeting at 3:47 PM.

4 [ERP - SLIDE 5]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: FINANCE & BUDGET



Functions/Topics

- Budgeting
- Revenue Management
- P-Card Management
- Accounts Payable
- General Ledger
- Bank Reconciliations
- Internal Auditing



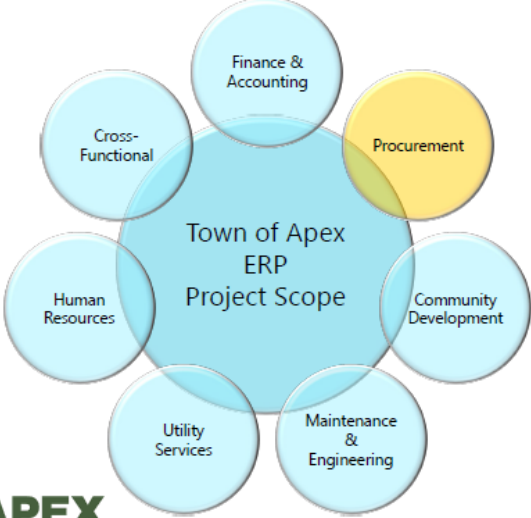
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1 **[ERP - SLIDE 6]**

TOWN OF APEX ERP ASSESSMENT
PROJECT SCOPE: PROCUREMENT



The diagram shows a central blue circle labeled "Town of Apex ERP Project Scope" surrounded by seven smaller circles: Finance & Accounting, Procurement (highlighted in yellow), Community Development, Maintenance & Engineering, Utility Services, Human Resources, and Cross-Functional.

Functions/Topics

- Contracts
- Vendor Data Management
- Purchasing
- Inventory Planning & Control
- Service Orders

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NORTH CAROLINA

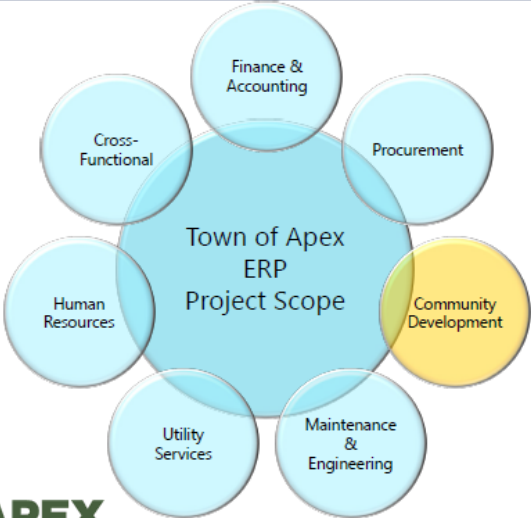
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3 **[ERP - SLIDE 7]**

TOWN OF APEX ERP ASSESSMENT
PROJECT SCOPE: COMMUNITY DEVELOPMENT



The diagram shows a central blue circle labeled "Town of Apex ERP Project Scope" surrounded by seven smaller circles: Finance & Accounting, Procurement, Community Development (highlighted in yellow), Maintenance & Engineering, Utility Services, Human Resources, and Cross-Functional.

Functions/Topics

- Projects & Parcels
- Planning
- Permits
- Inspections
- Fee Application & Collection
- GIS

APEX
NORTH CAROLINA

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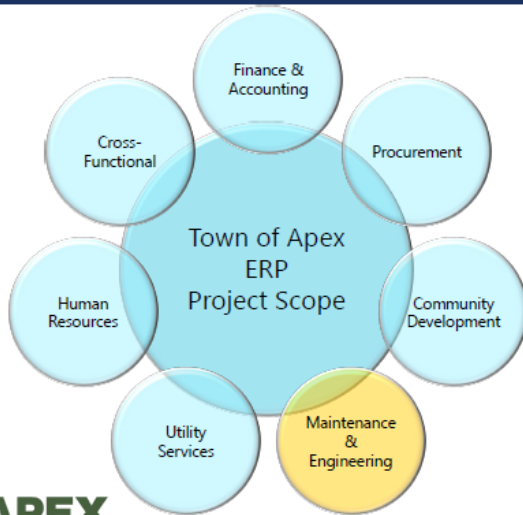
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1 [ERP - SLIDE 8]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: MAINTENANCE & ENGINEERING



Functions/Topics

- Road Maintenance
- Infrastructure Maintenance
- Facilities Maintenance
- Grounds Maintenance
- Fleet Management



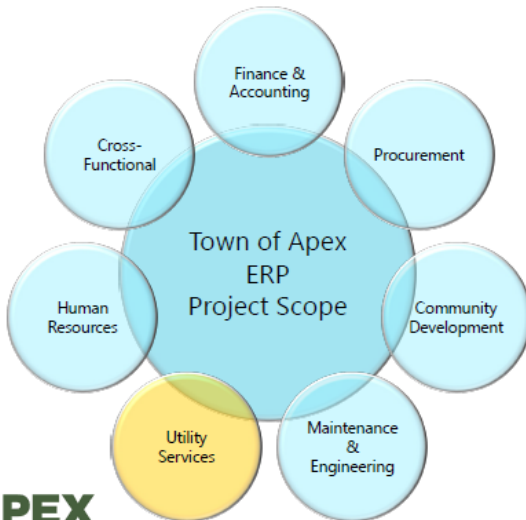
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3 [ERP - SLIDE 9]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: UTILITY SERVICES



Functions/Topics

- Utilities Maintenance
- Connects/Disconnects
- Revenue Collection
- Meter Services
- Asset Maintenance



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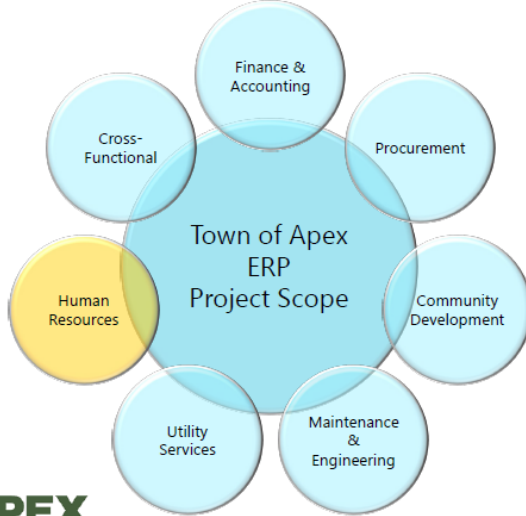
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1 [ERP - SLIDE 10]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: HUMAN RESOURCES



Functions/Topics

- Talent Acquisition
- Onboarding/Offboarding
- Employee Maintenance
- Pay Administration
- Benefits/Tax Deduction Management
- Position Control



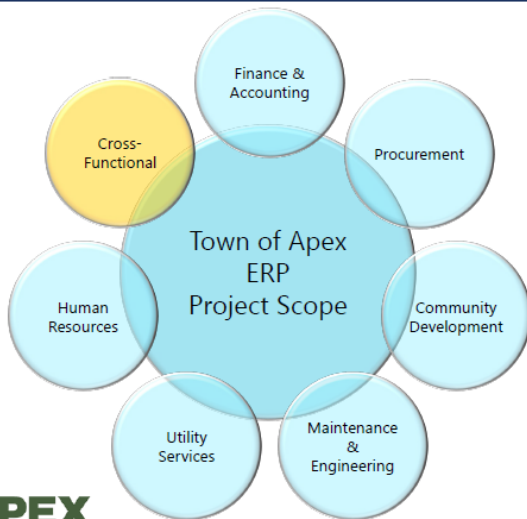
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3 [ERP - SLIDE 11]

TOWN OF APEX ERP ASSESSMENT PROJECT SCOPE: CROSS-FUNCTIONAL



Functions/Topics

- System Navigation & User Experience
- Security & Compliance
- System Administration
- Integration & Communications
- Workflows, Notifications & Alerts
- Document Management
- Queries, Reporting & Dashboards



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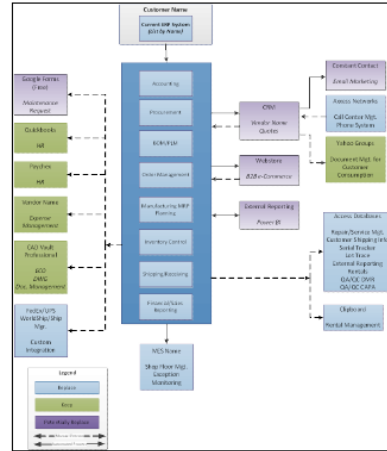
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1 [ERP - SLIDE 12]

TOWN OF APEX ERP ASSESSMENT MAJOR DELIVERABLES

Item#	Customer Name	Area	PRECEDENCE	Priority	Requirement	Notes/Comments	Priority Date/By	Status
Functional Area 1	Town of Apex	1	1					
Functional Area 2	Town of Apex	2	2					
Functional Area 3	Town of Apex	3	3					
Functional Area 4	Town of Apex	4	4					
Functional Area 5	Town of Apex	5	5					
Functional Area 6	Town of Apex	6	6					
Functional Area 7	Town of Apex	7	7					
Functional Area 8	Town of Apex	8	8					
Functional Area 9	Town of Apex	9	9					
Functional Area 10	Town of Apex	10	10					

Prioritized System Requirements



Current State IT Landscape

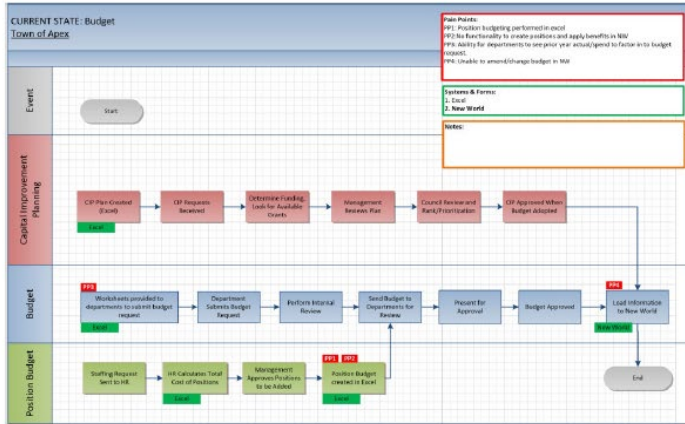


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3 [ERP - SLIDE 13]

TOWN OF APEX ERP ASSESSMENT MAJOR DELIVERABLES - CURRENT STATE PROCESS MAPS



Current state processes and work steps were documented along with:

- Work tasks
- Supporting systems
- Document/data flow
- Pain points



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1 [ERP - SLIDE 14]



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3 [ERP - SLIDE 15]

% FIT SCORES BY FUNCTIONAL AREA
ALL PRIORITIES

Functional Area	BS&A Software	OpenGov	Central Square	Origin	Edmunds GovTech	Tyler Tech	Infor (RPI Consultants)	Smart Energy Water	NewEdge /Cityworks
± Cross Functional	78.3%	73.9%	100.0%	97.8%	91.3%	100.0%	95.7%	100.0%	95.2%
± Finance & Accounting	87.3%	62.7%	93.0%	91.7%	91.3%	92.9%	90.3%	0.0%	0.0%
± Human Resources (HCM)	82.8%	60.0%	92.9%	99.4%	60.0%	98.5%	94.3%	0.0%	0.0%
± Permits & Inspections	78.6%	100.0%	100.0%	92.9%	85.7%	96.4%	92.9%	0.0%	91.4%
± Project Management	60.0%	0.0%	99.0%	95.0%	0.0%	90.0%	100.0%	0.0%	80.0%
± Supply Chain Management	38.7%	32.3%	87.1%	98.4%	87.1%	99.7%	100.0%	32.3%	64.5%
± Utility Billing	100.0%	86.2%	60.0%	100.0%	100.0%	100.0%	98.3%	100.0%	0.0%
± Work Order Management	0.0%	77.1%	100.0%	100.0%	78.6%	100.0%	100.0%	100.0%	100.0%
Grand Total	76.9%	62.4%	90.7%	95.7%	81.4%	96.3%	94.1%	24.4%	24.6%

Identify requirements listed for each section (vendor responses)



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5 **Councilmember Gantt** asked if these were all the same as far as importance goes.

6 **Director Sacco** said the town wants to keep all of these functionalities, but that they
7 could use multiple vendors for different functions if the integrations were smooth with each

DRAFT MINUTES

1 other. She said some of the vendors who could not offer certain functionalities could pair up
2 with another that does, so the possibilities are broader than just one company.

3 **Councilmember Gantt** asked if the 0's meant they couldn't offer it and couldn't
4 integrate with another company/software.

5 **Director Sacco** said that just mean they didn't offer a functionality themselves, and
6 that potential integration capabilities weren't assessed at this stage.

7 **Councilmember Gantt** said he was surprised these companies didn't all have at least
8 moderate capabilities in all of these capacities, considering so many municipalities have all of
9 these services.

10 **Director Sacco** said some of these companies are very niche, and have specified
11 roles. She said there weren't as many options that broadly covered all government services.

12 **Councilmember Mahaffey** asked what consideration was given to training and
13 integration for staff with these new products, and if the upgrade version of what the town
14 currently uses would be simpler.

15 **Director Sacco** said it was going to be sunset by the company that bought it, so the
16 new version is going to be different anyway.

17 **Councilmember Mahaffey** said this seems like a massive project.

18 **Director Sacco** said it is, and the care that has been taken throughout will be
19 discussed as well. She said they have been working on this for a long time, and are working
20 to ensure the data can be migrated cleanly when the transition begins. She said whoever they
21 go with has to be able to provide training and support moving forward.

22 **[ERP - SLIDE 16]**

OVERALL DEMONSTRATION SCORES

	Option A	Option B	
	Tyler	RPI/Infor	SEW
General - Vendor Overview	3.6	3.3	4.0
Average of RPI/Infor & SEW		3.7	
Total Score	3.6	3.7	
Cross Functional	3.8	3.4	
Finance & Accounting	3.6	3.6	
Planning/Project Management	3.7	3.4	
Permits & Inspections	3.6	3.7	
Supply Chain Management	3.4	3.3	
Human Resources	3.1	4.3	
Total Score	21.2	21.7	
	Tyler	SEW	
Utility Billing	3.8	3.8	
Work Order Management	3.5	3.2	
Total Score	7.3	7.0	
Overall Score	32.1	32.4	

Top 2 vendor picks by Core ERP Team:

- *Tyler Technologies*
- **RPI/Infor/SEW**

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1 [ERP - SLIDE 17]

REFERENCES CONTACTED



2



3 [ERP - SLIDE 18]

ERP FINALIST DECISION – OPTION A – RPI (INFOR) & SEW

Current State	Option A : RPI & SEW	Option B : Tyler Tech
Cornerstone	Infor CS Extended	Cornerstone
New World Human Resource	Infor CS Essentials	Munis
eHuman Resources	Infor CS Essentials	Munis
Executime	Infor CS Extended	Executime
Finance & HR	Finance & HR	Finance & HR
New World Finance	Infor CS Essentials	Munis
Budget	Infor CS Essentials (Questica)	Munis
Permits & Inspections	Permits & Inspections	Permits & Inspections
New Word Permits & Inspection	Infor IPS/IDT	Civic Services
ePermits	Infor IPS/IDT	Civic Services
Planning	Planning	Planning
New World Planning	Infor IPS/IDT	Civic Services
IDT	IDT* API Integration	Civic Services* No Integration with IDT
Supply Chain	Supply Chain	Supply Chain
New World Supply Chain	Infor CS Essentials	Munis
Utility Billing	Utility Billing	Utility Billing
New World Utility Billing	SEW	Munis
eSuites	SEW	Munis
Tyler Cashiering	SEW	Tyler Cashiering
Work Order Management	Work Order Management	Work Order Management
Cityworks	Cityworks* API Integration	Enterprise Asset Management
DataVoice*No Integration, CVS Import Only	DataVoice*Full API Integration	DataVoice*No Integration, CVS Import Only, Requires two separate resident facing apps.
LEGEND		
Current State		
Tyler Tech Software		
RPI & SEW Software		

Core ERP Choices:

- *Current State
New World/Tyler*
- **RPI/Infor/SEW**
- *Tyler Technologies*

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1 [ERP - SLIDE 19]

ENTERPRISE RESOURCE PLANNING PROJECT UPDATE:



ERP Project Status Update:

- Phase 3 of the Enterprise Resource Planning (ERP) Project is on schedule.
- All contracts have been signed and POs are scheduled to be open.
- Estimated completion date: Summer 2024.
- Finance, HR, and Budget to begin initially.
- Planning sessions with RPI, Milsoft, and SEW coming soon



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3 **Councilmember Gantt** wanted to hear about how future projects (such as the AMI)
4 were considered as part of the capabilities for these vendors.

5 **Director Sacco** said this was baked in, and that the new systems such as the AMI will
6 be able to work with this new ERP system.

7 **Councilmember Gantt** asked if these would allow updates to come more quickly with
8 the data.

9 **Director Sacco** said yes, it would allow updates to be much more frequent, possibly
10 coming in every 5-10 minutes for the AMI, rather than once daily.

11 **Councilmember Gray** said he was extremely impressed at the progress made for
12 such a complex project. He asked what the plan was to inform the public about potential
13 hiccups during the transition period, and what the plan is for how to mitigate issues.

14 **Director Sacco** said there will be consultants that help the town throughout the
15 process, and that support for problems that arise is baked into the contracts in some ways.
16 She said there will likely be some soft launches, but there will be issues. She said there's data
17 management people, consultants, and the vendors who will all be able to work with IT to
18 support this rollover.

19 **Councilmember Mahaffey** asked what the transition would be like, and if at some
20 point in time a task could be done on system or the other. He said he was worried if the
21 transition occurred and something critically needed to be fixed, would they be able to revert
22 back to the old system in the meantime.

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1 **Director Sacco** said yes, they will be concurrent, and there will plenty of time to have
2 both systems working during the transition period.

3 **Councilmember Mahaffey** asked how employees felt about this.

4 **Director Sacco** said they have been involved since the very beginning, and have been
5 taking their time to ensure people are ready for the change.

6 **Town Manager Crosby** said there will always be people who don't want to change,
7 as they've been used to one thing for so long. She said there have been some people who
8 were involved in both the AMI and the ERP process, and will be a part of the CSS process.

9 **Deputy Town Manager Purvis** said everybody will be trained on these new systems
10 to ensure everyone is prepared for the hard changeover date in the future.

11 **Councilmember Mahaffey** asked what level of support contracts include for the
12 beginning of the transition.

13 **Director Sacco** said there is 24-hour support for one year after the transition, and the
14 vendor will be directly taking support calls from residents who are having trouble with the
15 system during that time period.

16 **[Item No. 3 - CUSTOMER SERVICE SYSTEM (CSS) PROJECT]**

17 Assistant Town Manager Demetria John gave an overview presentation on the upcoming
18 Customer Service System (CSS) Update.

19 **[CSS - SLIDE 1]**

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Customer Services Standards (CSS) Project Overview

JUNE 20, 2023



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1 [CSS - SLIDE 2]

- The 3-phased project has been completed to assess the Town of Apex Customer Services Standards (CSS) Platform focused on service delivery to residents



Objectives

- Understand the Residents current journey and interactions as a baseline
- Assess & identify impacts causing a less than ideal resident experience
- Develop future state processes that enables Town of Apex to achieve their Resident Engagement Goals

THE PROJECT'S OBJECTIVES

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2 3 [CSS - SLIDE 3]

PHASE 1 RECAP – ASSESS CURRENT STATE

Scope, Activities and Outcomes



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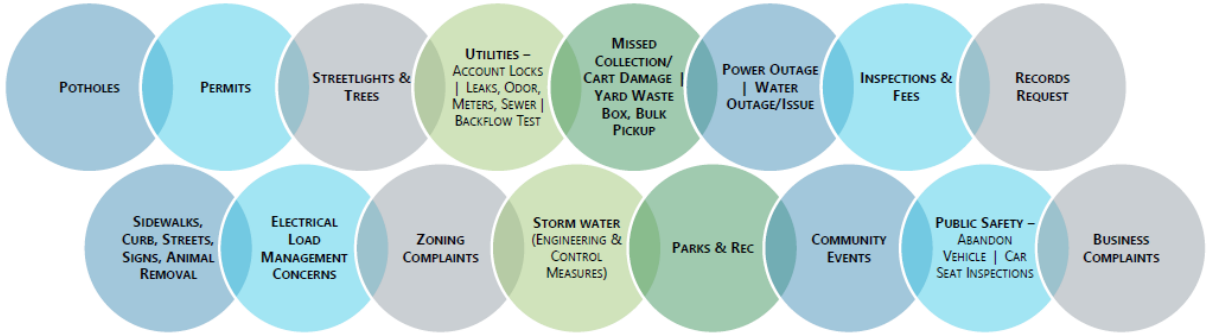
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1 [CSS - SLIDE 4]

FOCUSED ON CURRENT STATE SERVICE DELIVERY IN THE FOLLOWING AREAS:



Additional discussions & benchmarking with other communities:



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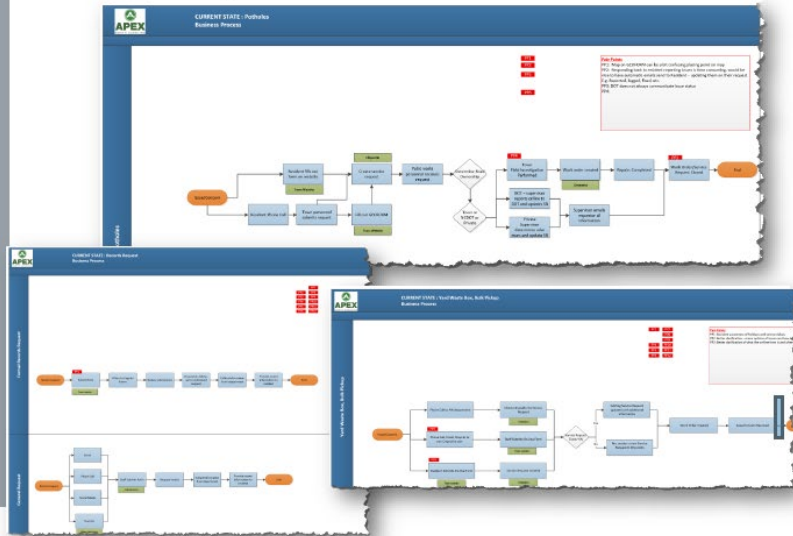
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3 [CSS - SLIDE 4]

PHASE 1 RECAP: Activities

- Generated current state business process maps for scoped service delivery areas



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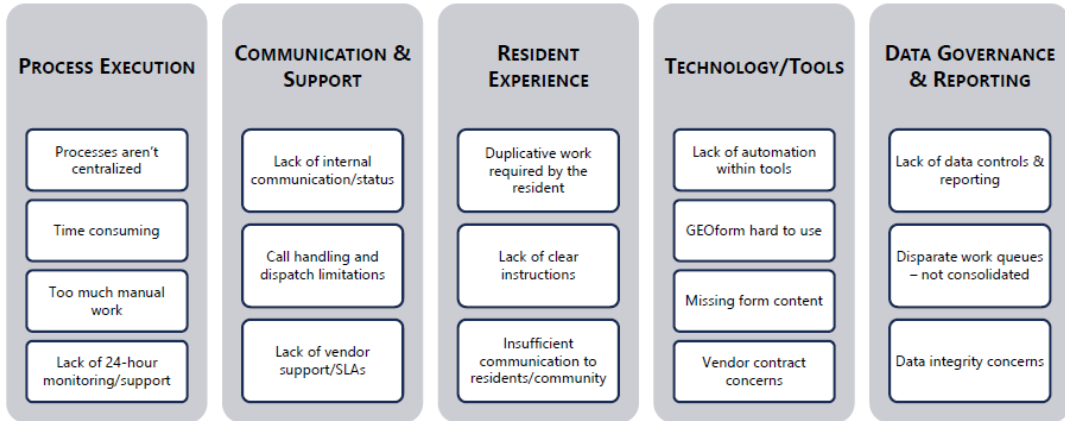
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1 [CSS - SLIDE 5]

PHASE 1 RECAP: Inefficiencies & Pain Point Themes



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6 [CSS - SLIDE 6]

PHASE 2 RECAP – BUILD CSS ROADMAP



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1 [CSS - SLIDE 7]

PHASE 2 ACTIVITIES

Generate the **strategic roadmap framework** by summarizing and formalizing the CSS goals and objectives from our ideation session today

Execute **resident survey** and analyze survey results for inputs into resident journey maps & future state processes



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3 [CSS - SLIDE 8]

ROADMAP FRAMEWORK – TOWN OF APEX STRATEGIC PLAN

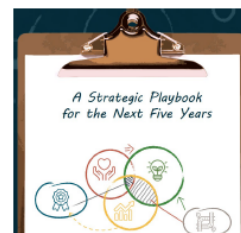
Alignment to Town of Apex strategic plan:

The following goals & objectives of the 2022 Apex Strategic Plan have direct impact on the way employees will delivery customer/resident services.

- **High Performing Government** – Deliver exceptional service valuing an engaged workforce with an emphasis on efficiency, collaboration, innovation, and inclusion.
- **A Welcoming Community** – Create a safe and welcoming environment fostering community connections and high-quality recreational and cultural experiences supporting a sense of belonging.

From the 2022 Strategic plan, the following strategic initiatives from the 2022 strategic plan were addressed as part of the Customer Service Standards journey:

- 1) Establish Customer Service Standards
- 2) Align and consolidate operational and business processes with technologies
- 3) Establish town performance management framework supported by metrics
- 4) Develop a space use plan to meet current and future needs



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1 [CSS - SLIDE 9]

ROADMAP FRAMEWORK – ESTABLISH “GUIDING PRINCIPLES”

To ensure the appropriate strategic direction for the Town of Apex Resident Service capability, the following Resident Service principles & standards were outlined to drive the recommended operating model and roadmap. These were essential in the decision-making processes and actions should align to any of these principles.

- *Generate effective, responsive, respectful, and consistent communication*
- *Provide prompt and personalized service*
- *Offer an empathetic ear*
- *Commit to educating customers*
- *Hold yourself accountable and be transparent*
- *Encouraging autonomy for our residents*
- *Provide accurate and relevant information*
- *Be thoroughly committed to follow-through, taking ownership and resolution*



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3 [CSS - SLIDE 10]

ROADMAP FRAMEWORK – ESTABLISH STANDARDS

In addition to the guiding principles, the core team identified the following *Service Standards*. The standards are designed to build greater resident synergies and make residents feel appreciated while developing a Town of Apex brand that anticipates resident’s needs and caters to them.

- The four key Standards identified for an excellent customer experience are:
 1. **Consistency** – deliver consistent services with integrity, accountability, and common sense
 2. **Empowered staff** – go above and beyond by taking ownership of issues and delivering positive experiences for our residents all the way through resolution
 3. **Responsive** - deliver a tailored and responsive service that is inclusive, consistent, and effective and meets the changing and individual needs of our residents.
 4. **Information** - be a trusted source of reliable and timely advice and information for residents.

The standards also identify the applicable philosophy behind the standards, activities that are required to support the standard and any tools needed to ensure standards can be adhered to.



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DRAFT MINUTES

1 [CSS - SLIDE 11]

2022 CUSTOMER SURVEY – RESIDENT FEEDBACK

We conducted a customer service survey with the goal to obtain direct input from Town of Apex residents regarding their experience, opinions, needs and preferences for customer service improvements that will guide future state decisions

Overall Objectives

- To capture data from residents that enabled us to:
 - a. Learn about the resident’s service experiences
 - b. Gain insight and capture residents wants, needs & improvement opportunities they would like to see from services/support
 - c. Determine current level of satisfaction when receiving services
 - d. Build awareness of the Town of Apex Services



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3 [CSS - SLIDE 12]

KEY INPUTS - 2022 RESIDENT SURVEY RESULTS

Overall Survey Learnings that drove future state decisions:

- Survey provided volume insight: appeared that typically no more than 5 customer service interactions per resident. Combined with recent calls volumes this info was used as input into the recommended future state resource plan
- Survey provided baselines for customer satisfaction in the following:

Overall quality of customer service from employees

- 2017 - 86%
- 2020 - 90%
- 2022 - 90% (76% satisfied/very satisfied - 14% neutral)

Availability of opportunities for citizens to provide feedback

- 2017 - 61%
- 2020 - 67%
- 2022 - 58%

Awareness/usage of customer services (called, visited online or in person)

- 2017 - 43%
- 2020 - 40%
- 2022 - 63%

- Survey confirmed roughly a 50/50 split between phone/live interaction and digital interaction preferences for residents
- A good portion of interactions are related to *requests for information* which indicates a use for a resident knowledge based and/or website “clean-up”
- Future state training should focus issue acknowledgement, tracking & resolution as well as functional area knowledge. Also, need to address concerns regarding residents feeling valued as a customer



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5 **Councilmember Gray** asked if they had the demographic data on these responses.

6 **Director Sacco** said she would get with communications to find out that information.

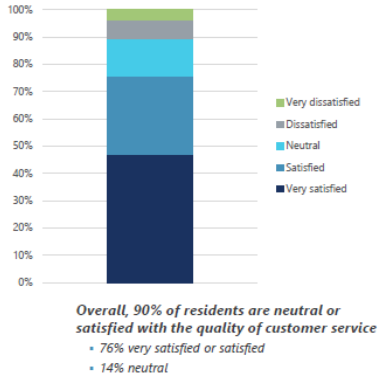
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1 [CSS - SLIDE 13]

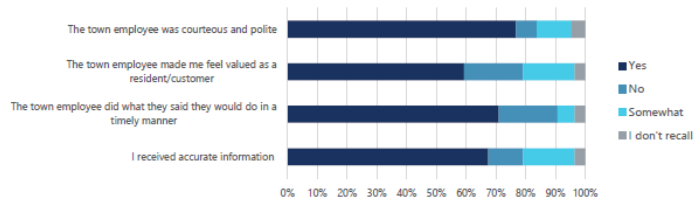
KEY INPUTS - 2022 RESIDENT SURVEY RESULTS

Overall Quality of Resident Service from Town of Apex:



Key Survey Results

When asked about their most recent interaction with the Town of Apex staff, residents stated:



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3 [CSS - SLIDE 14]

ROADMAP ACTIVITIES – INDUSTRY FEEDBACK

Industry Research – we capture of lessons learned from other operational implementations & customer satisfaction efforts from several *high-performing* Towns across the nation

Key Recommendations

- Have a process flow for cross-department and document policies and procedures and figure out a way to ensure they are kept current.
- Plan for daily updates - daily stand-up meetings to address any real-time changes was beneficial
- Develop policies that define how to interact with residents and how to distribute information to residents/community
- Implement changes in phases, if moving to centralized model, select a few departments to consolidate initially and iron out any kinks.
- Record all calls & implement a monitoring program
- Think of agents as ambassadors of the Town - look for candidates that offer quality over experience.

Key Learnings

Operating hours & call volumes

- Ability to measure call volumes across department lines is imperative to prove & drive behavior
- Most centers do not operate 24/7 – typical 12 hours shifts, 5 to 7 days a week with coverage based on call volumes
- A mix of “big-bang” vs. phased approach to 311 implementation
- Across the board, the highest volume of service requests were related to sanitation/garbage collection

Communications:

- There is constant change within departments, getting info from other departments was a challenge
- Ensure the management of after-hours support is addressed - getting the “after-hours” call tree implemented effectively was challenging
- Recommend the 311-service center be managed separately than the 911-center as conflicting needs and priorities made policy decisions and definitions difficult
- When communicating new 311 capability to residents, a huge increase in non-specific needs from residents happened. Call volumes went up significantly for first month or two.



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5 **Assistant Town Manager John** said getting the demographic information for these
6 surveys was important to analyze things such as language barriers, disability impacts, and
7 accommodation needs in order to see how to go forward with this process.

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1 [CSS - SLIDE 15]

PHASE 3 RECAP – DEFINE DESIRED RESIDENT ENGAGEMENT



3 [CSS - SLIDE 16]

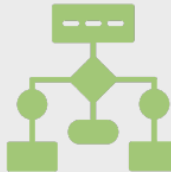
PHASE 3 ACTIVITIES



Conduct future state **resident journey mapping sessions** to define the Resident's experience when engaging the Town of Apex



Prioritize scope for future state service delivery improvements - which areas are most critical and when



Develop applicable future state **business process maps** aligned with resident's journey



Develop internal & external **communication & adoption plan** for CSS execution



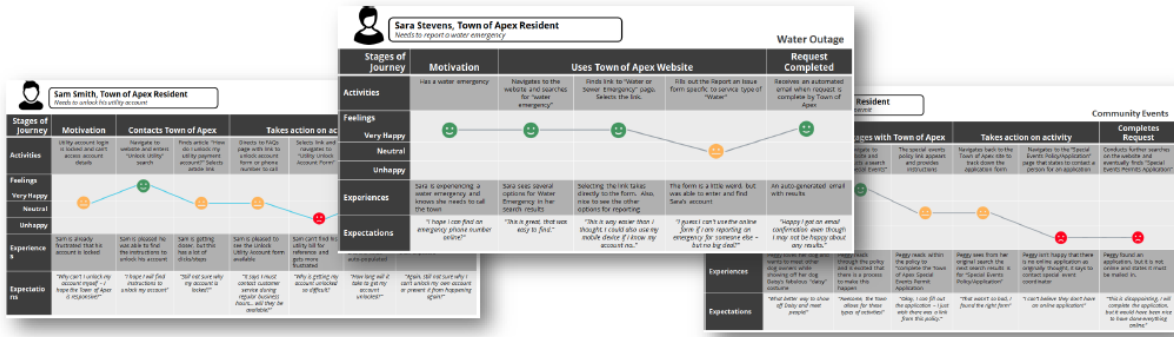
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1 [CSS - SLIDE 17]

CUSTOMER JOURNEY MAPS

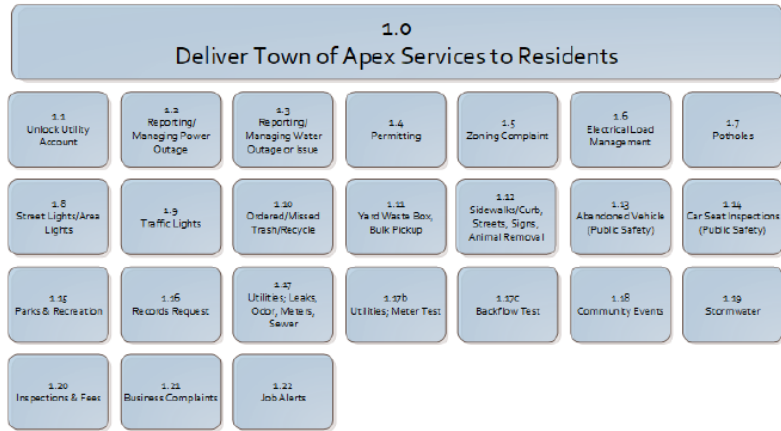
To help identify future state needs for Resident services, customer journey maps were prepared and reviewed to provide insight into the digital resident experience...



2 3 [CSS - SLIDE 18]

FUTURE STATE PROCESS FLOWS

Future state process flows were developed and reviewed for several service request types.



4 5 6 7

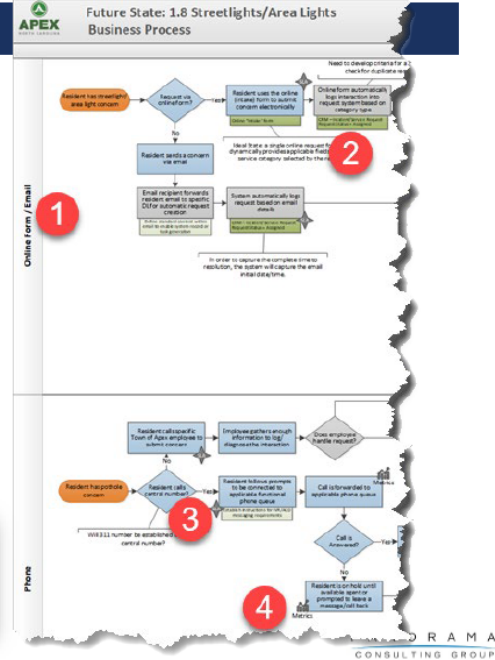
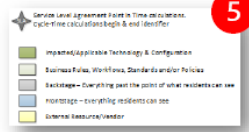
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1 [CSS - SLIDE 19]

FUTURE STATE PROCESS FLOWS – TRAINING ASSET

The process maps contain necessary information to align, automate and measure process steps that enhances an agent's ability to cross-train across service types

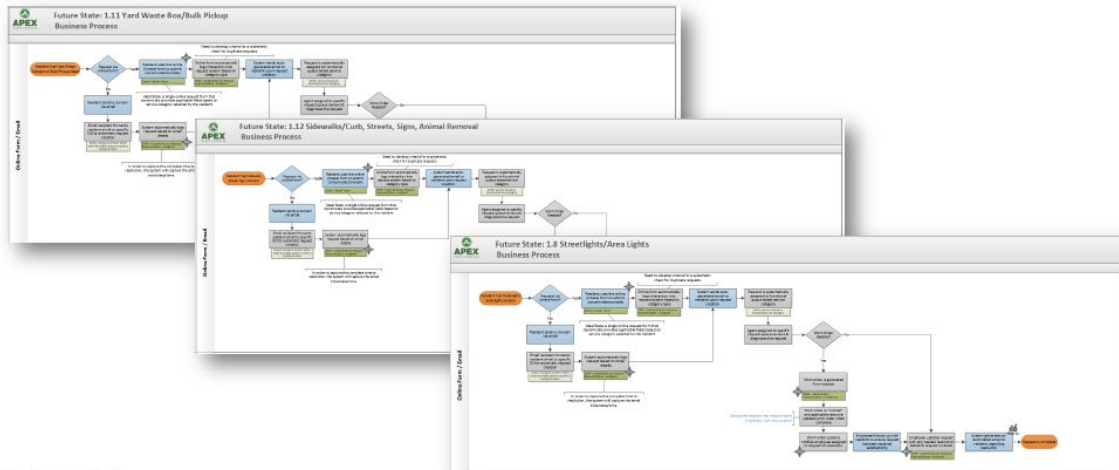
- 1 Maps outline the business process by channel
- 2 Helpful tips including best practices as well as the technology required to capture the data in included in all maps
- 3 Service Level Agreement (SLAs) are noted within the maps to identify applicable measures
- 4 Additionally, metrics are pointed out when data needs to be captured and measures
- 5 Maps are color-coded to better identify impacts to residents & more...



2 [CSS - SLIDE 20]

FUTURE STATE PROCESS FLOWS – HARMONIZED PROCESSES

The maps made it possible to “harmonize” processes and develop consistency across service categories & channels



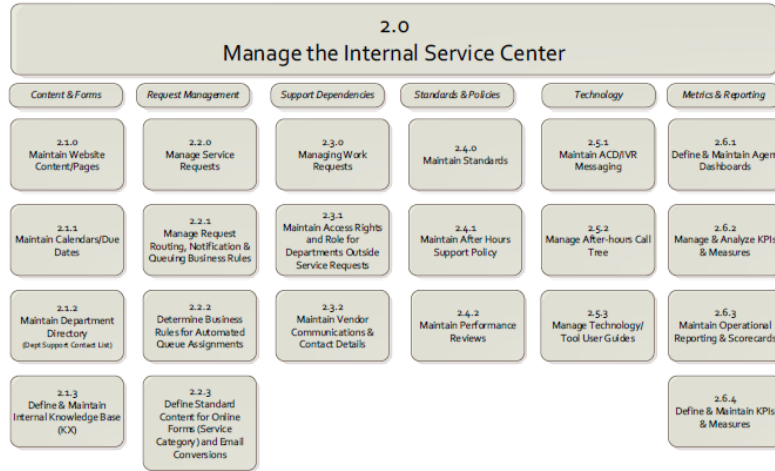
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1 [CSS - SLIDE 21]



Future state standard operating procedures (SOPs) topics were identified to aide in the development of the new operating model



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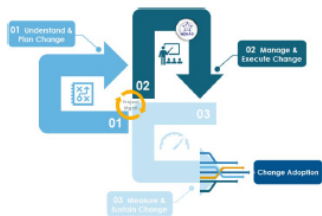
3 [CSS - SLIDE 22]

CHANGE MANAGEMENT, COMMUNICATIONS & TRAINING

A change strategy has been built to support the implementation of the centralized model and includes...

OCM Plan

The 3-stage organizational change plan outlines the recommended actions to enable the Town of Apex employee's to adopt the new operating model



Training & Knowledge Transfer Templates

A template/checklist to aide the development of training for new operations as well as knowledge transfer for departmental cross-training

Communication Matrix

A template to document the types of communications the project will deploy during implementation

COMMUNICATIONS PLAN					RACI		TRAINING MILESTONES COMPLETION	COMMUNICATIONS RELEASE SCHEDULE				RELEASE STATUS				
METHOD	CHANNEL	DESCRIPTION	PRIMARY AUDIENCE (Stakeholder Group)	SECONDARY RECIPIENT	SEMI-KEY MESSG	MESSAGE (Key Priority Audience) (with frequency of change/announcements)		RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED	January	February	March	April	STATUS
Leadership Messaging	Planned E-Mail	Contractual Project Team, Department Leads, Targeted email	High Level Stakeholder	HR Stakeholder	Project Team Department Leader (OCM) Communication Training	Operational impact & impact how to be an internal leader, benefits, communication opportunities, best practices, being prepared for new work ways like change	OCM Team	Platinum, Executive Leads, OCM (Communication) Training	Communications, Executive Leads, Platinum, Executive Leads, OCM (Communication) Training	Stakeholder						



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1 [CSS - SLIDE 23]

CONTINUOUS IMPROVEMENT & METRICS

Outline the most crucial metrics for initial implementation that will provide insight and guidance through the "phased" implementation approach

- **Customer Satisfaction (CSAT)** - *calculated using a post-call survey question: "On a scale of one to ten, how satisfied are you with our service today?" in addition to annual surveys, etc.*
- **First Contact Resolution (FCR)** – *the percentage of incoming service calls/digital requests that are resolved during the first interaction with the resident*
- **Average Speed of Answer (ASA)** - *the amount of time it takes to answer a typical call/digital request once it has been routed to a queue*
- **Average Handling Time** - *the amount of time it takes to help a resident with their request starting from when the customer call begins to hold time & after-call work is completed*

Industry benchmarks

First Contact Resolution (FCR)

- 65-75% of requests are resolved on the first contact

Average Speed of Answer (ASA)

- Phone: 80% of calls answered within 20 seconds (Government/Public – 9 seconds)
- Email: 100% of emails answered within 24 hours
- Live Chat: 80% of chats answered within 20 seconds

Average Handling Time

- Current industry standard is between 6.46 & 6.73 minutes with Government/Public Sector averages at ~7 minutes



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3 [CSS - SLIDE 24]

NEXT STEPS TO IMPLEMENT THE CSS SOLUTION

Customer Service Standards:

1. Buildout the Detailed Project Plan, Timeline and Activities with the correct staff
2. Develop the Detailed Project Cost Estimate (include consultants or just staff)
3. Launch CSS Implementation Project in coordination with CRM System

Customer Relations Manager (CRM) System tasks:

- Confirm, validate & prioritize CRM requirements.
- Develop a demonstration script.
- Engage Infor CRM vendor personnel and prepare them for the system demonstration.
- Collaborate and evaluate to ensure if Infor CRM will adequately support the organization's needs.
- Assist Client in contracting activities, as needed.



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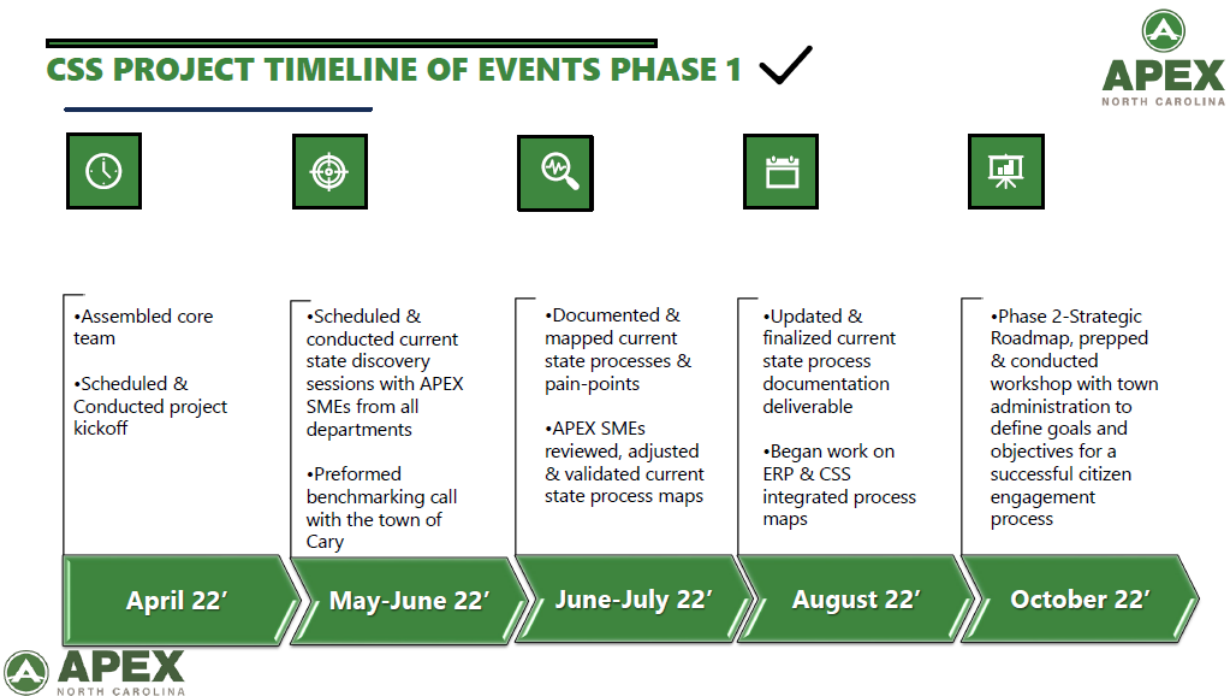
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1 [CSS - SLIDE 25]



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3 **Councilmember Mahaffey** asked how far behind Cary and Holly Springs the town is.

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5 **Director Sacco** said that would be discussed soon.

6

7 **Councilmember Gantt** asked if most of the issues staff describes with customers are things that occur repeatedly, or if issues are more isolated.

8

9 **Director Sacco** said she's only able to speak to what data says, and some things are trash-related problems, but that the same customer has different issues or different customers have the same issue, and not the same exact problem instance recurring. She said the goal is to have a centralized location for people to be able to submit requests for assistance and report problems.

10

11 **Assistant Town Manager John** said a lot of times residents will complain about numbers leading to no answers and a "black hole" being created. She said centralizing the phone number should help with this.

12

13 **Town Manager Crosby** said GFL was the biggest call the town got, and that created a challenge because they were a vendor, so the town could not fully track the problem resolution. She said Public Works Director John Mullis has done a great job ensuring staff are able to track issues to resolution through a good relationship with GFL. She said he is also looking at ways in which the town could respond quicker to those kinds of issues.

14

15 **Councilmember Gantt** said he has felt that relying on vendors created a situation where some of these problems were unsolvable to a degree.

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DRAFT MINUTES

1 **Assistant Town Manager Stone** said they service so many properties that there is a
2 large chance of making some mistake in any week, but that the complaint rate was about
3 0.4%. He said it is inevitable to get a certain number of complaints as the town grows
4 because of the scale of the services provided. He said the town still has to be responsible for
5 tracking these and doing what they can to make things better.

6 **Mayor Gilbert** asked how soon the old main phone number would go away with the
7 new system.

8 **Director Sacco** said the new number could be whatever the town chooses, and it
9 could be the one that is most well-known.

10 **Councilmember Mahaffey** said he felt a 311 system was cool.

11 **Town Manager Crosby** said they had some conversations about seeing if that could
12 be done.

13 **Director Sacco** said it was a lot of work to set a system like that up for landlines, and a
14 completely different task if it was to be set up for cellular as well.

15 **Councilmember Mahaffey** said he was excited that there would be a CRM for the
16 town and things were centralized and tracked. He said he thinks the issue is that people feel
17 like they can't get connected with the right place for help with their complaint easily.

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19 **[CSS - SLIDE 26]**



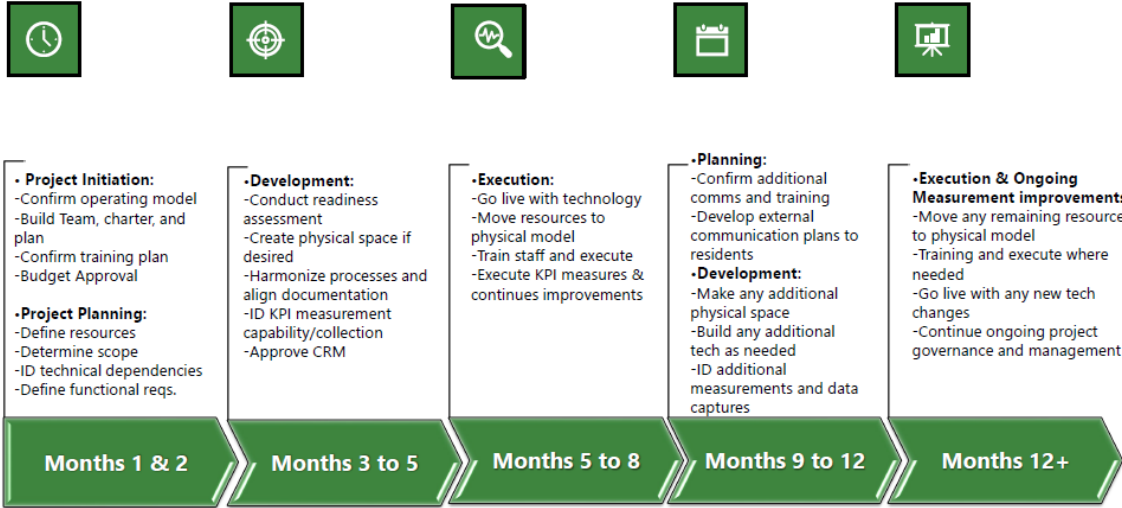
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1 [CSS - SLIDE 27]

CSS PROJECT ACTION PLAN PROPOSED IMPLEMENTATION



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3 **Assistant Town Manager John** discussed the implementation of this program, as

4 shown above. She said the community engagement position, CSS manager, and customer

5 service ambassadors in the next several months, after the next fiscal year begins. She said this

6 group will coordinate the beginning of this rollout. She said she hopes there would be at

7 least a soft launch of the program by the Spring of 2024. She added that training and

8 onboarding was critical, and Panorama could help with that.

9 **Councilmember Gantt** asked how many employees this would require to keep things

10 centralized as the town grows.

11 **Town Manager Crosby** said there may need to be more than just the original core

12 team for the CSS eventually, but that they would often work with someone from a specific

13 department to resolves matters, even if each department doesn't have a position specifically

14 made for that customer service purpose.

15 **Assistant Town Manager John** said Panorama presented three options, and that

16 they recommended the centralized model for the town. She said a decentralized option was

17 on the table, but keeping it in-house and centralized was what they chose, and that

18 departments would continue to field calls as CSS staff get up to speed with each

19 department's normal calls.

20 **Mayor Gilbert** said he appreciated all the work that went into these programs. He

21 said he wanted to ask for a motion to go into closed session to discuss a personnel matter.

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[CLOSED SESSION] - Added

A **motion** was made by **Mayor Pro Tempore Killingsworth**, seconded by **Councilmember Gray**, to enter into Closed Session pursuant to NCGS § 143-318.11(a)(6) - Personnel.

VOTE: UNANIMOUS (4-0), with Councilmember Zegerman absent.

Council moved into closed session at 4:48 p.m.

Council returned to open session at 5:27 p.m.

[ADJOURNEMENT]

Mayor Gilbert adjourned the meeting at 5:27 p.m.

Jacques K. Gilbert
Apex, Mayor

Allen Coleman, CMC, NCCCC
Apex, Town Clerk

Submitted for approval by Apex Town Clerk Allen Coleman.

Minutes approved on _____ of _____, 2023.