



Digital Modernization and Corporate-wide Customer Service Strategy

Final Report – August 2026



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Executive Summary

Background and Context

Over the last decade people's experience of service has changed as online services, apps and chatbots have transformed the way people interact with organizations like banks, retailers, hotels, insurers and provincial and federal governments.

Along with it, the service expectations of North Bay's residents, businesses and visitors about the way they interact with the City have also been changed significantly.

For those who regularly use Uber, SkipTheDishes or Airbnb, and the 88% of Canadians who bank online, they prefer digital and self-service from their governments. For those who work 8:00 a.m. to 5:00 p.m., they want to access city services at times that match their schedule and they don't want to have to come to City Hall simply to access simple City services like a tax bill reprint. For those who don't or can't use the internet, or don't have a smart phone – they also want and expect convenient access to services, either in person or over the phone.

Regardless of how they interact with the City, the community expects the municipality to provide consistent, high-quality services, when, where and how it works for them.

This Strategy is about meeting those expectations.

Current Challenges

Like many other municipalities across Canada, North Bay has found those expectations difficult to meet. Service today is fragmented, evolved around the City's organizational structure rather than customer needs, and delivered department by department from different locations and to different standards.

Without a single "front door", common service standards, or shared systems to process requests and maintain a customer's history, nothing ties these functions together and requests can easily fall through the cracks as they pass from customer service staff to back office and field staff. Customers can easily become frustrated as they navigate the complexity.

Online services on the City's website that enable customers to self-serve are somewhat limited or incomplete, pushing customers to call or come into City facilities during office hours which is disruptive to customers and expensive for the City to deliver.

The City has struggled to respond because the fragmentation that customers see also exists in the back office. Too many processes are not digitized – running on paper and forms-based processes which are manual and labour-intensive. Too many of the City's processes run through multiple systems or involve work arounds leading to duplication. Where there are systems in place too few of the City's systems are integrated – resulting in re-keying of information.

This consumes a great deal of staff time and makes processes difficult to manage and the handoff from a customer's service request to the team who completes the work harder than it should be.

This is not solely an ERP issue – its many of the business solutions and underlying technology that the City operates which carry gaps that must be addressed, including Finance, Tax, HR, Work and Asset Management, Permitting and Licensing, Transit, Fire, Customer Relationship Management (CRM) and other business solutions.

Two important ideas flow out of the current situation: the City cannot provide a digital service for a process that has not been digitized, and it cannot deliver a great service on a process that has not been optimized. Putting an online form on the website in front of a manual, paper-driven process does not remove the delay or inefficiency; it just moves it somewhere the customer cannot see.

The Importance of An Integrated Strategy

This Strategy advances the direction set in the City's 2017-2027 Strategic Plan and the 2023 Organizational Review conducted by KPMG, turning those commitments into a digital and customer service action plan.

It brings together a set of components into one integrated Strategy and aligned program of work that addresses the need to optimize and digitize before delivering digitally:

1. Customer service. Delivering measurably high-quality service consistently across every channel with service transformation as the goal and digital as an enabler.
2. Digital delivery. Moving the City's highest-volume transactions to online self-service, while preserving phone and in-person access for everyone else.
3. Business solutions and technology foundations. Digitizing business processes and modernizing the corporate systems and infrastructure that customer-facing services depend on.

Six workstreams organize the implementation of the Strategy into specific programs of work which are then sequenced into an overall implementation plan.

There are four focused on what needs to be done:

1. **Customer Forward.** Investments in the establishment of Service North Bay, the unified front door for the City's public-facing services.
2. **Digital Solutions.** Investments in critical online, public-facing tools such as a new website, CRM, expansion of online services, online payments and the digitization of forms.
3. **Business Solutions.** Important investments in corporate systems to drive organizational efficiency and effectiveness, while supporting the connection between office and mobile work and enhanced customer experiences. This includes systems to support human resources, finance, procurement, tax system updates, work and asset management, permits and licences, records management and recreation facility booking and program registration – some of which are already underway.
4. **Foundational Technology.** A set of key investments in foundational technology to modernize and secure the City's corporate network, storage, and computing infrastructure to take advantage of cloud capabilities, to update telephony, implement a robust identity management approach, and further advance integration capabilities.

And two that are focused on how the Strategy should be delivered and creating the conditions for success:

5. **Governance.** Establish the critical, executive-led, decision-making, prioritization and oversight and delivery framework to ensure this plan will be executed, that projects and initiatives are funded and resourced, and which connects and integrates all of the workstreams.
6. **Delivery Capability and Capacity.** Investment in the necessary people, skills, training, and a new operating and organizational model to deliver on this plan.

The Vision

The City's leaders, working with Perry Group, developed the following vision statement, to act as a North Star to guide how the City will change its approach, the outcomes expected, and to make a commitment to the community to deliver high-quality customer experiences:

"North Bay will become a customer-focused, digitally-enabled municipality where services are designed around people, delivered consistently across all channels, and continuously improved to meet the evolving needs of our community."

The Vision pulls on several important threads:

1. **Customer focused / designed around people:** the City will design services with and for the customer to make things easier for the customer, not to make it more convenient for the City.
2. **Digitally enabled:** the City will work to offer all its services online for self-service, focusing first on launching those with the largest transaction volumes and with the biggest impact to the community.
3. **All channels:** no one is left behind. While the City will design services to be digitally delivered, it will in parallel continue to provide all services via phone and face to face for those who don't wish to or cannot use digital services.
4. **Consistent:** regardless of channel used by the customer, department or service provided, the experience will look and feel consistent and will be tracked so that no issues fall between the cracks.
5. **Continuously improved:** recognizes that the work is never done, there are always improvements and changes to be made and opportunities to improve – this is the City's commitment to continue that work iteratively improving day after day.

Guiding Principles

To realize the vision is not just about implementing new solutions and services, it requires a change in thinking and approach across the whole organization. Eight guiding principles have been developed to help enable this change and to anchor future service, digital and customer experience decision making:

1. **Digital First (Not Digital Only).** Services should be designed for digital delivery first, while ensuring alternatives for those who need or prefer them.
2. **Assisted Digital When Needed.** When customers cannot or choose not to self-serve, staff should be able to assist them using the same digital tools.
3. **Easy to Find, Easy to Understand.** Services and information should be easy to locate, clearly explained, and written in plain language.
4. **End-to-end Services.** Digital services should be complete, covering the full journey from initiation to resolution, not just individual steps.
5. **Design with and for Users.** Services should be designed with user insights, research and lived experiences, not assumptions.
6. **Consistency Across the Organization.** Customers should experience “One City, One Customer” regardless of department or service area.
7. **Reuse before buying, buy before building.** Use existing platforms and solutions before replacing and look to buy solutions rather than building in-house.

8. **Measure and Improve.** Digital and customer service performance should be measured, monitored and continuously improved over time.

The principles are designed for internal use by City leadership and staff as they conceive, plan and execute initiatives identified in this Strategy and conduct work to implement new and re-design existing services.

For each decision made as part of a project or initiative, leaders and teams can check directions, strategies, tactics, their own behaviours and actions against the principles to ensure that they are following the spirit and intent of this Strategy.

For instance, when launching a new service – project leaders can ask “Are we designing this to be a digital service from the outset?”, or “Have we sought the input of users of this service before we design and implement a change or a new technology for a service?”

By actively and consistently using and applying these principles, leaders can gradually change the organizational culture so that every time a service is introduced, or redesigned, or a new technology introduced that it is done the right way.

Establishing Service North Bay

At the centre of the Strategy is Service North Bay. Modelled after successful provincial and federal service delivery models and widely adopted by other municipalities, it's an approach that intentionally puts *service* first.

Initially it will begin as a revamp of the existing customer service team under a new brand and identity. One team, one location at City Hall, one phone number, one dedicated email address, and one website location – all designed to provide a simple, one-stop way of interacting with the City for customers. This team will aim to resolve 80% of customer inquiries at first contact – without having to hand off the request to back-office teams.

With modernized tools – improved telephony, website and CRM tool – to support this team, it will be positioned to provide consistent, recorded, and measurably improved service for an initial subset of City services, before gradually expanding across all city services.

It's the foundation for becoming a one-stop shop for many City services that will grow over time, adding suitable services from departments across the City to be resolved at the first point of contact as the value of the service is proven, relieving pressure on departments and improving the customer experience. In the longer-term, satellite locations at the Community Centre, arenas and other City facilities will be positioned to offer one-stop Service North Bay services – meeting customers where they are.

The Service North Bay brand will also extend to the City's newly introduced digital services – using the same name and visual standards to provide consistent, trusted and integrated digital services. Reusing the Service North Bay brand helps build recognition and trust with customers.

Outcomes

For residents, businesses, and visitors. Residents will be able to easily reach the City through one front door, phone number, email, website, and the City will own and track the interaction from start to successful completion.

Customer information will be captured once, and progress will be shared proactively with customers rather than them having to ask the City for updates. Digital options will be progressively introduced for the City's highest-volume transactions first, while friendly and capable human service via the phone and in person remains available through the same front door.

Satisfaction with City customer service and the experience of interacting with the City will be measured, reported and will measurably increase.

For staff. Staff will see clearer ownership of every service and service request, less duplication of effort across departments, fewer systems to switch between in a working day, and better tools to do the work.

Customer service training will be consistent throughout the organization, and a no wrong door commitment will mean that the staff member who picks up the call owns the handoff.

Staff whose work happens in the field will have proper mobile capabilities to do their jobs from where the work is.

For leadership. Leadership will gain visibility into service delivery, and supporting data, which helps pinpoint good service and identify opportunities for continuous improvement.

They will gain a portfolio view of digital and customer service investments, with clear accountability, and measurable outcomes against each one. A formal intake and prioritization process will replace ad-hoc decisions on what gets funded, supported by regular reporting to the Senior Leadership Team (SLT) and regular updates to Council as appropriate and at key milestones. Decisions about where to invest next will be based on evidence and data.

Recommendations

The Strategy makes the following core recommendations:

1. **Adopt the recommended governance model.** Council sets strategic direction through the endorsement of the strategy. The Senior Leadership Team is established as the Governance Steering Committee, with supporting Program Groups, and an intake, prioritization, and portfolio delivery process.
2. **Adopt the vision, guiding principles and goals** as the basis for all future digital, technology and customer service decisions.
3. **Establish Service North Bay.** Endorse the consolidated front-door model at City Hall, and the phased rollout of Service North Bay, with Phase 1 launching with customer support for Finance, Parking, By-law Inquiries and Enforcement, and Parks, Arts, Culture and Recreation, and general inquiries and payments, with subsequent expansion to other department services and the longer-term introduction of satellite Service North Bay locations in Community Centres and other City facilities.
4. **Implement core technologies** that Service North Bay will depend upon: a CRM (PSD Citywide), a modernized telephony platform, a new website, modernized corporate payments, and digital services for high-volume transactions.
5. **Implement and update foundational technologies** including updated Enterprise Resource Planning (ERP) strategy (NaviLine modernization and cloud migration, tax portal and a new Human Resources Information System (HRIS)), Xplor Recreation, work and asset management, document and records management on Microsoft 365 (M365), geographic information system (GIS) expansion, infrastructure modernization, and cybersecurity and resilience.
6. **Invest in resourcing, delivery capability and capacity** across Service North Bay, Information Services (IS) and the business units.
7. **Commit to measuring and reporting** outcomes against the Strategy, customer service targets and digital adoption goals to SLT, and to Council on a regular basis.

Iterative Implementation Approach

The Strategy envisions significant change, which will be challenging for North Bay, and which therefore must be implemented in incremental phases – and be supported by a strong communication and change management program.

The first year focuses on establishing the foundations and launching the highest priority initiatives. Years two and three concentrate on embedding new ways of working and expanding them across services. The remaining years focus on integrating these changes into routine operations and driving continuous improvement.

A small number of first-wave priorities are recommended to prove the new operating model in visible ways. Candidates include several priority online services including online service requests, facility booking, burn permits, the Service North Bay Phase 1 launch, the introduction of a CRM system, a Customer Portal and the website content management system (CMS) replacement.

The work is captured in a detailed implementation plan organized by workstream, theme, and timing, and [Chapter 12](#) outlines this implementation plan in full.

The recommendations represent a significant amount of work, delivered in phases over the course of the Strategy rather than all at once. The City has approved \$500,000 for 2026 and requested an additional \$500,000 in 2027 to support the implementation of the Strategy. Approximately \$5.7M in previously approved funding is available to support the ERP implementation and an additional \$1M was requested to be added in 2027. Not all the funding required for the delivery is net new. The Strategy will be used to inform future budget considerations for investments in software and services, and to align resourcing and capacity with the work ahead.

Conclusion

The Digital Modernization and Corporate-wide Customer Service Strategy represents an integrated Strategy that sets a single direction: put the customer first, deliver services digitally where it makes sense, digitize the back-office processes those services depend upon, build the capacity to deliver and establish Service North Bay as the visible front door to the City.

The work ahead is substantial. The expectations gap is wide, the back-office foundations need as much attention as the customer-facing services, and the City's delivery capacity is limited.

Success will depend on sustained capacity and resourcing, disciplined prioritization, and budget aligned to the plan. Success around transformation is not about buying the right technology – it's about leading complex, inter-connected organizational change.

The Strategy provides a clear direction, an integrated and sequenced plan and the governance model to follow through. With Council and SLT endorsement, commitment, and discipline North Bay can begin the work its residents are expecting.

1.0 Introduction

In 2025 the City of North Bay engaged Perry Group Consulting to develop a Digital and Customer Service Strategy for the next stage of how the City serves its community.

The Strategy was initiated as an outcome of the City's 2023 Organizational Review completed by KPMG, which identified opportunities and called for significant digital and customer service enhancements.

They are presented as one integrated Strategy because the work in each directly affects the other: customer service improvements depend on the technology that supports and enables them, and technology modernization is judged by the difference it makes to the customer and staff experience. If they are not integrated – they tend to pull in different directions which is unproductive.

The Strategy is intended to modernize how the City delivers service, provide a consistent customer experience across all the ways that customers interact with the City (referred to as channels), find efficiencies, strengthen performance measurement, and make effective use of technology and resources so that investments deliver lasting value. Just as important, it creates alignment across the organization, which is essential to success.

The work was carried out by Perry Group Consulting in partnership with the City over the past year. It was anchored by extensive engagement with the Senior Management Team, City staff, the Mayor and City Council, and various service partners. The findings, recommendations and implementation plan that follow reflect the evidence gathered and the operational reality of delivering municipal services at North Bay's scale.

1.1 Why this Matters Now

The expectations residents bring to municipal service in 2026 have changed faster than most municipalities have been able to respond to. North Bay is not unique in facing that gap, but the work of closing it cannot be deferred further. A set of distinct pressures is converging at once:

1. **Customer expectations continue to rise.** Residents now compare their interactions with the City against every other service in their lives, from banking apps and online retailers to provincial and federal government portals. They expect clear information, fewer handoffs, online options where appropriate, automated status updates, and capable human service when they need it.

2. **Service demand and complexity are growing.** Increasing legislative requirements and rising expectations all place more pressure on the same staff and systems. Without stronger coordination, alignment, service design, integration, and governance, the City risks adding more tools that add complexity without reducing the underlying challenges that staff and residents feel today.
3. **Cost pressures are rising.** All municipalities are facing challenges to deliver on their mandate while costs and affordability pressures increase – this is putting fiscal pressure on municipalities to do more with the same or less resources; to become more efficient and effective.
4. **Technical debt is accumulating.** Specific to North Bay, core systems are aging, underutilized, integration between them is limited, and frontline staff waste time toggling between multiple systems to get work done. Management struggles to form a complete view of data spread across disparate systems. Manual paper-based workflows persist alongside online forms, and the website is not a reliable service tool.

1.2 Purpose of this Report

The purpose of this report is to provide the City of North Bay with a clear and practical framework and direction for the next stage of customer service and digital improvement.

It is a comprehensive representation of the work undertaken to challenge the status quo and it brings together the findings from discovery, presents the strategic directions established during the strategize phase, and the implementation plan required to realize the vision into one document the City can act on.

The report explains where North Bay is today, what direction the City should take, what operating conditions need to be strengthened, and how implementation should be sequenced across the next five years and beyond.

It is written for several audiences at once:

1. For Council and senior staff, it provides a strategic view of the City's current position, recommendations, conditions for success, and direction the work will take.
2. For SLT, it provides a framework for decision-making, prioritization, ownership, and sequencing across departments.
3. For staff across the organization, it provides a practical operating guide for how customer service, digital solutions, business solutions, technology, governance and delivery should work together. It also identifies how to align local work with the priorities and principles outlined in the Strategy.

4. For frontline staff, residents, businesses, and visitors they serve, it sets the standard for what service excellence looks like at the City and what they can expect as Service North Bay phases in over the next several years.

When used consistently across these audiences, the report and supporting materials developed throughout the project can help create alignment from Council through to leadership and staff, and across departments and functions. This shared understanding and commitment will be a critical enabler of the Strategy's successful implementation.

The report does not replace future business cases, procurement plans, project charters, solution designs, cybersecurity plans, information management policies, or individual departmental operating plans. It does provide a common direction that those future decisions and documents should draw from and align to.

1.3 Scope and Planning Horizon

This Strategy covers the customer service, digital and underlying technology capabilities required to support better municipal services, stronger internal operations, improved customer experience, and more sustainable delivery. Both internal and external customer needs are in scope. The City's service partners are addressed through the governance model rather than treated as separate workstreams. Our advice at this stage is to focus on the foundational work at the City before expanding or extending additional services to partners.

The planning horizon runs through to 2031, with several recommendations extending beyond that point. Some initiatives will require further analysis, costing, business case development, procurement planning and Council/Leadership approval before implementation. The roadmap is therefore directional and sequenced rather than fixed in every detail.

The Strategy should be used as both a roadmap and a management tool. It is intended to help the City decide what to do first, what to defer, what dependencies must be resolved, and what conditions must be strengthened before scaling up. It should be used to inform future budget development and resource planning.

1.4 Acknowledgements

Perry Group Consulting would like to acknowledge the active engagement, openness and support of the City of North Bay throughout this project. City staff contributed through the IT, Digital and Customer Services Satisfaction Survey and through the discovery and strategize phases of the work.

The Mayor, Deputy Mayor and members of Council shared their perspectives on service experiences and valuable community feedback through various dedicated Council sessions. Various service partners and community groups participated in consultations on the operational and service connections between their work and the City's. SLT provided direction throughout the engagement and confirmed the strategic direction through an all-day Strategy Workshop on April 22, 2026.

2.0 Project Approach

The work to develop this Strategy was carried out in three sequential phases: Discovery, Strategize and Plan. The phases produced the evidence base, set the strategic directions and implementation plan that follow in the rest of this report.

2.1 Discovery

The Discovery phase involved in-depth engagement with senior leadership and management at the City, business units, technology staff and frontline Customer Service Associates, supported by site visits across City facilities and a structured set of maturity and capability assessments.

Four assessment lenses were applied:

1. **Customer Service Maturity Model.** A placement of the City against the eight-stage Perry Group customer service maturity scale, scored across the four customer service domains of people, channels, process and technology.
2. **Digital Maturity Model (DMM).** A placement of the City against a 5-stage scale running from Digital Resister through to Digital Master, scored across people, process and technology.
3. **Municipal Online Services Assessment (MOSA).** A scored benchmark of the City's online service offering against comparator municipalities and digital leaders across Canada.
4. **Municipal Technology Model (MTM).** A structured review of the City's technology environment, covering platforms, architecture, integration, support model and investment patterns.

We also used Perry Group's Municipal Service List (MSL) to build an inventory of customer-facing services offered by the City, working with business units to capture annual transaction volumes and digital availability for each, which we used later to identify priority services for digital improvement.

The Discovery phase produced the findings reported in [Chapter 4](#).

2.2 Strategize

The Strategize phase translated the discovery findings into strategic direction. It involved co-creation with SLT of the vision, the guiding principles, the governance model, and the Service North Bay model. The service standards and performance targets in this report are Perry Group's recommendations, based on municipal best practice.

The April 22, 2026 Strategy Workshop with SLT was the decision milestone for this phase. At that workshop, SLT confirmed the strategic direction, the Service North Bay model, the phased rollout approach, priority digital services, and the direction on the CRM decision.

The Strategize phase produced the vision and direction set out in [Chapter 5](#) and the Service North Bay model set out in [Chapter 6](#).

2.3 Plan

The Plan phase turned the strategic direction into a prioritized, sequenced roadmap. It is set out in the implementation plan, organized by workstream and timing, with each item identified and sequenced in [Chapter 12](#) and in [Appendix A](#) with priority and sizing and Perry Group estimated order of magnitude budget estimates.

The plan phase also produced this Strategy report which is the final deliverable of this Strategy project.

3.0 Setting the Context

There is value in setting the context within which this Strategy is developed, before laying out the Strategy itself.

3.1 Service Expectations

Municipalities like North Bay deliver a wide range of services, which are received and used by customers and users in the context of how they interact with other service providers – such as hydro, telecom, internet providers, insurance firms and banks.

Over the past decade or more, customer expectations of government service have been reset by other organizations that members of the community interact with modernizing their service delivery in line with today's norms.

Today, banks, hydro, retailers, federal and provincial governments, and digital service providers across every sector have moved their services online.

Banks operate extended hours and on weekends. Their call centres are available 24x7. You can “chat” with your telecom provider and change your services at 2:00 am from your couch. Doctors offer online booking, Netflix, YouTube, Crave offer new ways of accessing traditional TV services, and Uber and Airbnb have changed how we move around.

Today, municipal services such as finding out when garbage pickup is, or booking ice or a picnic spot, or checking a tax bill, or getting a business licence or a permit for a deck are all compared to that baseline.

Citizen First 2023 survey data confirms a significant shift in customer preferences¹. 76% of Canadians now prefer online as their first choice when interacting with government, and the number rises every year.

Municipalities are delivering within this new reality, and if they don't keep up with expectations they risk significant reputational damage, loss of credibility and public confidence, and as being seen as outdated, inefficient, and ineffective.

¹ Citizens First is a long-running research program run by the Institute of Citizen Centred Services that tracks Canadian expectations of and experience with government services

3.2 Value Driver for Change

Industry research places the cost of a typical service interaction at roughly \$1 online, \$5 through a contact centre, \$10+ at a counter, and \$12+ with a back-office specialist:

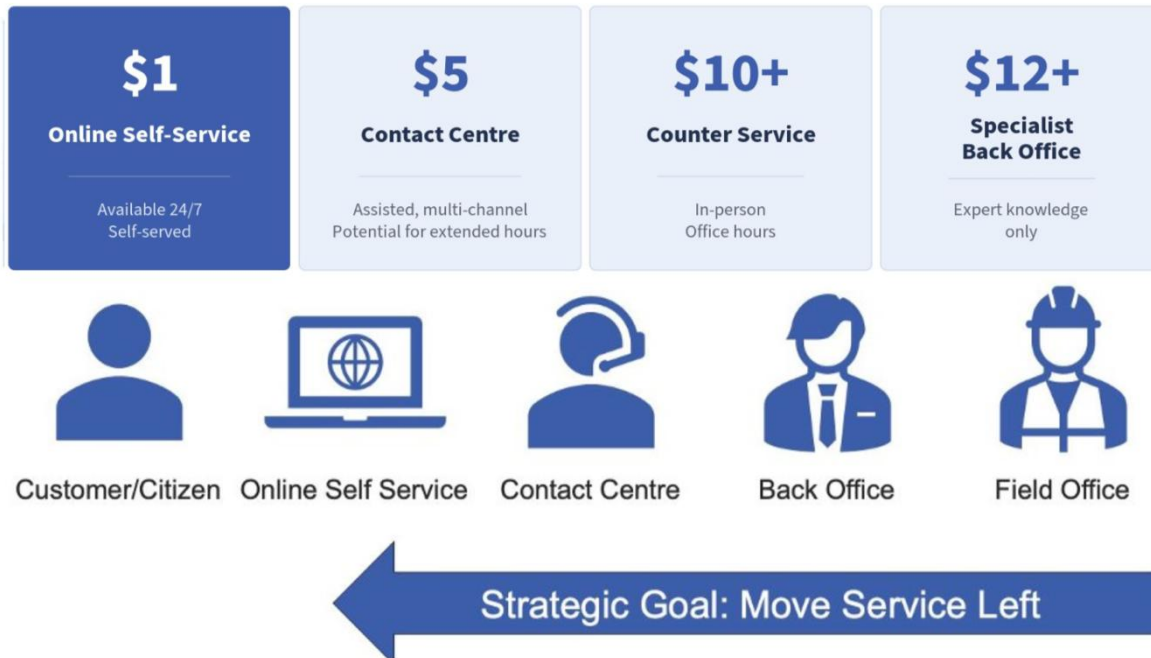


Figure 1: The economics of customer service channel shift - This figure represents indicative costs from industry research, not specific costs for City of North Bay

Moving an interaction as far left as possible reduces delivery cost to the municipality and can improve the experience for the customer at the same time, provided the digital channel works. It also frees up specialist back-office staff to focus on their core roles and avoid frequent interruptions.

In a municipal environment of cost pressures, the economics of different customer channels reinforces the importance of this approach to municipalities that are looking to stretch scarce resources. This becomes a key driver for encouraging adoption of digital channels for those who want to use them, which according to Citizen First, is potentially three quarters of the community.

Importantly, the shift is not about replacing human service with digital service. Instead, it is about offering the channel that works best for each customer, and making sure that whichever channel they choose, the City is the same City behind it.

3.3 What this Means for North Bay

These two concepts point toward a few simple ideas about how the City can deliver great digital and customer experiences:

1. **Single point of entry.** Make it easy for a customer to know how to contact the City – a single number, website, email address – so that they can get answers and help at the first stop without being bounced between departments.
2. **Digital First.** All information and services should be available digitally via a single website so that customers can self-serve, and customer service staff can help customers by using the website on their behalf.
3. **Promote digital adoption.** It benefits the City to promote digital adoption at every opportunity to reduce back-office pressures and costs.
4. **Preserve choice.** Not everyone wants to use digital services – so the City must make it easy to call or come in, or to support users in their use of the digital service.
5. **Service Consistency.** Regardless of whether a customer chooses to click, call or come in – they should receive the same high level of service. All customer interactions should be consistently recorded, tracked to closure/resolution, and performance and customer satisfaction should be monitored and reported.
6. **Experts remain experts.** A contact centre is the first point of contact that handles general and high-volume inquiries and service requests and as a result becomes expert at providing high quality, professional customer service. Specialized work stays with the subject-matter experts who do it best. Complex cases are routed to them, not taken away.

It is within this context that the consulting team looked closely at the City's current service delivery and digital capabilities as part of Discovery, the results of which are presented in the next chapter.

4.0 Discovery Findings

Before setting future Strategy, it is important to honestly assess the current situation.

With the consulting team's help, City staff and management were able to reflect on where the City is today compared to municipal best practices, to understand what's working well, what's not, and where the key opportunities and gaps exist. The results of these findings are provided in this chapter.

The discovery findings combine what the consulting team heard through engagement with staff, Council and partners with a set of formal assessments of the City's current state.

4.1 What We Heard from Staff, Council and Partners

Engagement during the Discovery phase surfaced consistent themes across audiences:

1. **The Mayor and members of Council shared customer frustrations** about navigating the City's complex internal structure, about inquiries falling between the cracks, and about not being kept informed when issues take more than one interaction to resolve.
2. **Frontline staff** struggled to help customers whose information sits across multiple systems and who may have already told their story to different staff.
3. **Business unit managers** flagged the cost of doing similar work in different ways across departments.
4. **Senior leaders** wanted to better understand investment priorities, have a clearer line of sight into investments and a clearer understanding of the outcomes.
5. **Service partners and community groups** described the operational and service connections between their work and the City's, and where stronger integration and a shared customer record would help residents and partners alike.

The message across the different audiences was that although the City has dedicated and capable people, the supporting structures and processes, tools and technologies have not kept pace with what the City needs to deliver services to the expectation levels of the community.

4.2 Where Assessments Place the City

The formal assessments conducted by the consulting team confirm the anecdotal commentary, finding that North Bay is at an early stage on customer service and digital maturity – with room to grow online.

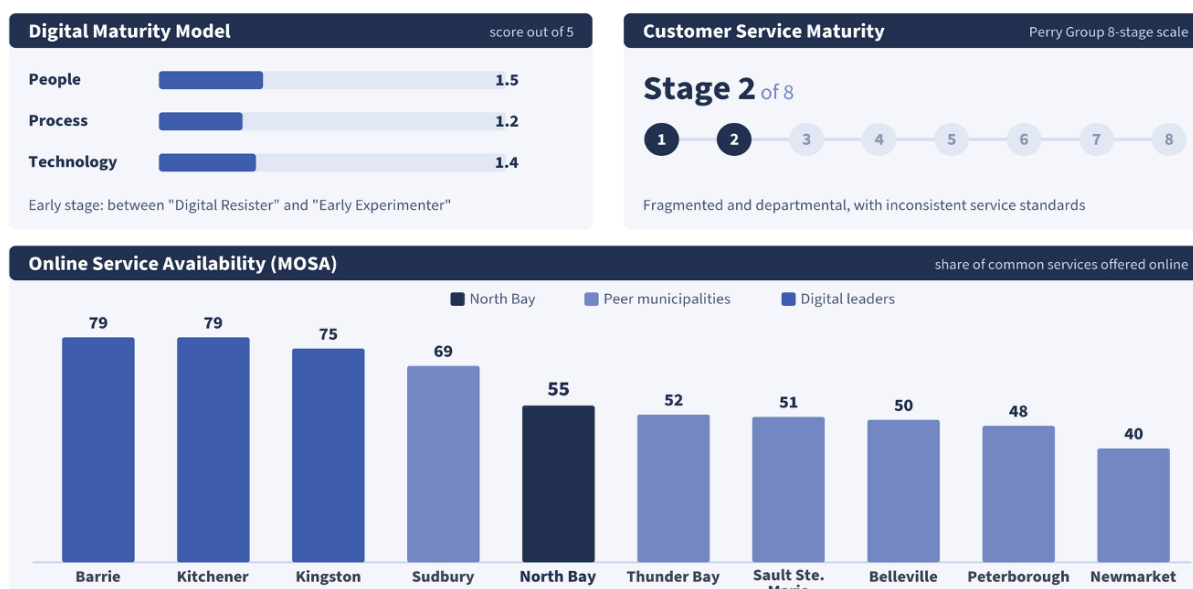


Figure 2: Discovery assessment results summary

4.3 Digital Maturity and Online Service Availability

Digital maturity assesses how effectively an organization is positioned to leverage modern digital and technology capabilities to achieve its goals. It examines key dimensions including people, processes, data, and technology, as well as the organization's digital culture and readiness for change. Specifically, it considers the digital awareness and skills of staff, the organization's capacity to deliver and sustain digital transformation initiatives, its agility in adopting emerging technologies, and the extent to which services and operations have been digitized to improve efficiency and customer experience.

This assessment shows the City has low maturity, specifically highlighting:

- A lack of awareness of the art of the possible.
- Limited experience moving City services to digital offerings.
- Limited organizational readiness and limited digital mindsets.
- Limited modern technical skills.
- Limited experience delivering transformation.
- Limited organizational experience with project delivery and change management practices.

On the municipal online services assessment, which measures the coverage of commonly provided municipal online services, North Bay scored moderately well at 55%.

The comparators used were Sudbury, Thunder Bay, Newmarket, Belleville, Peterborough, and Sault Ste. Marie. These were selected as peers of comparable size and service profile, including northern Ontario municipalities facing similar geographic and service delivery conditions.

It is worth noting, however, that the assessment does not look at the quality of the services provided, and we do know that some of the online services offered by North Bay are not complete services. For instance, allowing online applications but providing no ability to pay online.

Nonetheless, leaders like Barrie, Kingston and Sudbury show that there are many opportunities to extend and expand North Bay's online service offerings.

4.4 Customer Service Maturity

The customer service maturity model developed by Perry Group has drawn from leading municipalities. The key factors that underpin great customer service delivery are a combination of assessment factors, the maturity, and a trajectory, as illustrated below.

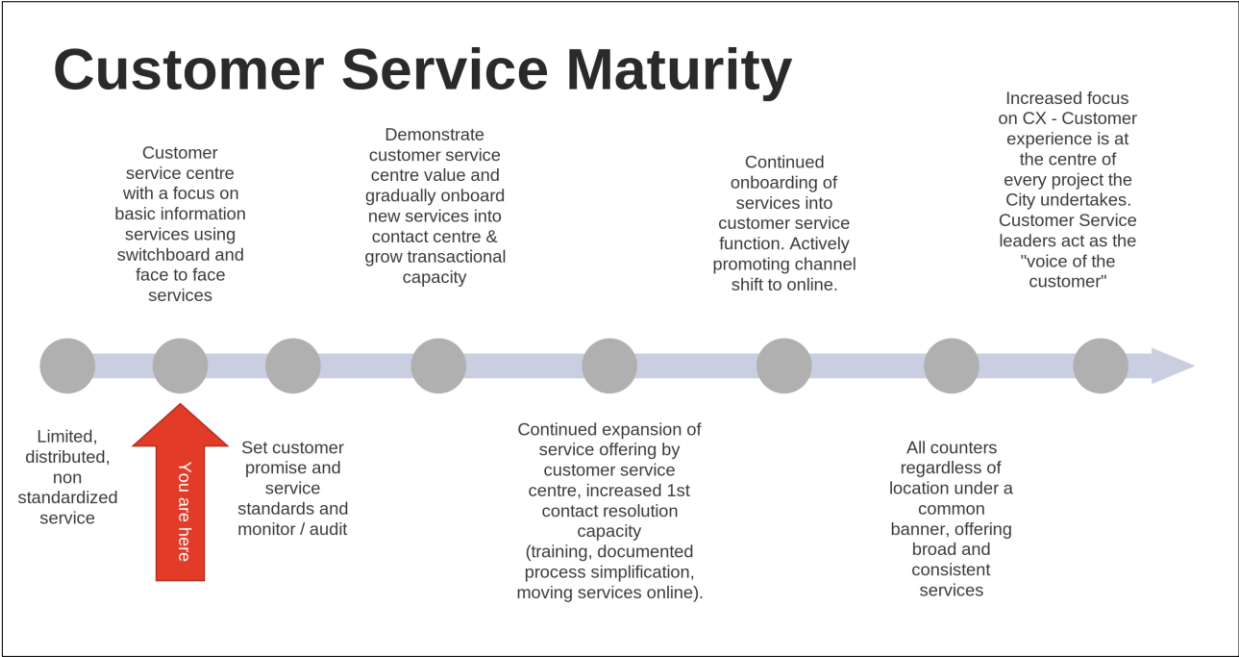


Figure 3: Customer Service Maturity Journey

On both scales, the City rates in the early stages of maturity across the assessments, largely due to:

- Fragmented service delivery with many published phone numbers and generalized emails and numerous customer counters on different floors and across geographical locations, resulting in a confusing customer wayfinding experience.
- The current customer service team operates as a switchboard largely with limited scope to resolve inquiries at the first point of contact.
- There are limited telephony capabilities to provide queues, wait management, and callbacks for customers' convenience.
- There are no service standards, customer service commitments, or consistent monitoring of performance across all of the service delivery locations.
- There are no corporate tools to track, route, or resolve service requests.
- There are no feedback mechanisms for service improvement.
- There is no shared customer record across service areas or a record of transactions with customers.

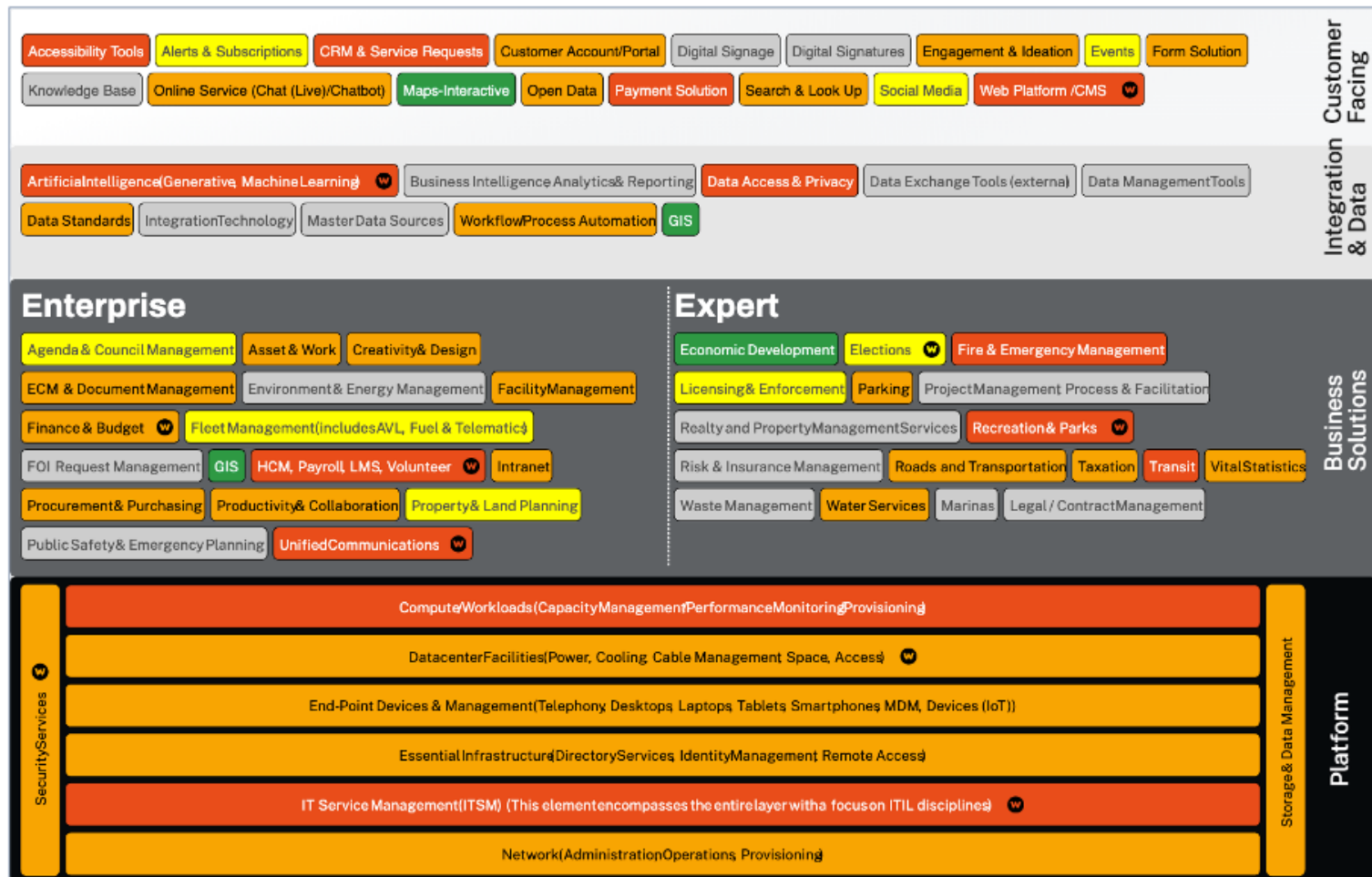
4.5 The MTM: The Technology Environment

Underpinning each of these assessments is the City's technology environment.

The MTM is Perry Group's reference model for a municipal technology environment, developed with Canadian municipalities over the past decade.

It organizes a city's technology into four connected layers, built from the bottom up: Infrastructure at the base, then Business Solutions, Integration and Data, and Customer-Facing at the top. Each layer depends on the ones beneath it, so a weakness low in the stack limits everything above it.

Assessing North Bay against the model shows where the City is in good shape and where work is needed:



Good Shape	Satisfactory	Needs Improvement	Risk	Gap	(W)
System or process is well established and performing well.	System or process is acceptable but may require monitoring.	Notable concerns or weaknesses around the system or process that require improvement.	Indicates a high level of risk that warrants attention.	No system or process is currently in place.	Work is in progress on this system or process.

Note: this is a snapshot prepared 6 months ago as part of discovery work and is out of date. City staff have been working to mitigate key risks.

Figure 4: North Bay's technology environment assessed against the Municipal Technology Model. Green is in good shape, yellow needs to be monitored, orange needs work, red is at risk or due for replacement, and grey is missing.

We understand that the diagram can be overwhelming, but it is intended to provide a comprehensive view and reveal the complexity of the technology landscape and what must be managed by the IS team and its partners.

Read from the bottom up, North Bay needs work at every layer, and the weakest points are the foundations that everything else relies on:

1. **Infrastructure.** The City carries significant technical debt, reliance on on-premise technology, a legacy phone system and limited internal service management tools.
2. **Business Solutions.** The situation here is mixed. At the time of the Discovery assessment, the ERP future was under review (as discussed later in the Strategy) and there is no HRIS. Multiple work and asset management systems overlap. There is a tendency to develop systems in-house – with significant technical debt in developed solutions. Although there is strong end-to-end use of PSD Citywide for building permits and planning which is a bright spot, there are various other systems that are outdated, underused, or in which business processes are still manual.
3. **Integration and Data.** The strong GIS is a real positive here, but no formalized data governance, data or strong BI tools, no single customer or other master records, and limited integration between systems are inhibitors.
4. **Customer-Facing.** The website technology is outdated, and the content is not meeting the needs to enable customers to self-serve or for customer service staff to get answers on customer behalf. There are few true end-to-end online services, again permitting and planning are bright spots here. There is no CRM system, limited corporate online payments, or digital signatures.

Overall, we see a technology environment that needs significant attention, which is inhibiting internal service effectiveness and undermining the City's ability to deliver great customer experiences.

4.6 What the Current State Means for the Strategy

Across the themes above, a consistent picture emerges. The City of North Bay has dedicated people and some meaningful work already in motion, but its supporting approaches, processes, and technologies have not kept pace with what staff, residents, businesses and visitors now expect.

Like many organizations facing resource constraints and growing service demands, the City is primarily focused on operational delivery. While this ensures essential services continue to run effectively, it also limits the organization's ability to invest in modernization, innovation, and continuous improvement. Consequently, initiatives aimed at enhancing customer experience and expanding digital services can be difficult to prioritize and sustain.

Delivering consistently great customer experiences requires a clear north star and strong alignment between people, processes, and technology. Today, those elements are not fully aligned. Processes and technologies have not kept pace with evolving expectations, resources are constrained, and improvement efforts are often driven by immediate needs rather than a long-term vision.

The result can be a series of isolated initiatives that address individual problems but do not always contribute to a cohesive customer experience. Without a structured approach to transformation, these efforts can increase complexity, duplicate effort, and create challenges elsewhere in the organization. A clear roadmap and disciplined approach to change are therefore critical to achieving lasting improvements.

What the City needs is a clear, thoughtful Strategy that logically lays out sequencing to break the cycle of reactivity and begin to gradually put the foundational components in place that will support sustainable, long-term improvement.

And that's what follows in the next chapter.

5.0 Setting the Vision

With the context set and our understanding of the current state established, this chapter lays out the vision for where the City is going. It also introduces and explains the goals, and the principles that will guide the work, and how the work is organized to deliver upon the vision.

5.1 Digital and Customer Service Goals

At its heart, this integrated digital and customer service Strategy is about:

1. **Making interacting with the City easy, frictionless, and consistent for customers.** Providing customers with great experiences helps build trust in government effectiveness and efficiency.
2. **Making interactions self-service/digital where possible.** Providing anytime, anywhere convenience, reducing back-office pressures and reducing service delivery costs.
3. **Resolving inquiries / requests where possible at the first point of contact.** Reducing frustrating and inefficient hand-offs and reducing back-office interruptions.

The City will pursue these goals while preserving choice and meeting customers where they are at – by always giving customers the opportunity to click, call or come in to interact with the City.

5.2 Vision for North Bay

The vision statement, a statement of intent, for the Strategy was confirmed by SLT at the April 22 Strategy Workshop:

“North Bay will become a customer-focused, digitally-enabled municipality where services are designed around people, delivered consistently across all channels, and continuously improved to meet the evolving needs of our community.”

The Vision pulls on several important threads:

1. **Customer focused / designed around people:** the City will design services with and for the customer to make things easier for the customer, not to make it more convenient for the City.
2. **Digitally enabled:** the City will work to offer all its services online for self-service, focusing first on launching those with the largest transaction volumes and with the biggest impact to the community.

3. **All channels:** no one is left behind: while the City will design services to be digitally delivered, it will in parallel continue to provide all services via phone and face to face for those who don't wish to or cannot use digital services.
4. **Consistent:** regardless of channel used by the customer, department or service provided, the experience will look and feel consistent and will be tracked so that no issues fall between the cracks
5. **Continuously improved:** recognizes that the work is never done, there are always improvements and changes to be made and opportunities to improve – this is the City's commitment to continue that work iteratively improving day after day.

The vision is the anchor for the principles and recommendations in the sections that follow.

5.3 Guiding Principles

Eight guiding principles anchor the digital and customer service decisions the City makes. Senior Leadership commits to making digital and customer service decisions and investments based on the principles:

1. **Digital First (Not Digital Only).** Services should be designed for digital delivery first, while ensuring alternatives for those who need or prefer them.
2. **Assisted Digital When Needed.** When customers cannot or choose not to self-serve, staff should be able to assist them using the same digital tools.
3. **Easy to Find, Easy to Understand.** Services and information should be easy to locate, clearly explained, and written in plain language.
4. **End-to-end Services.** Digital services should be complete, covering the full journey from request to resolution, not just individual steps.
5. **Design with and for Users.** Services should be designed using customer insight, user research and lived experiences, not assumptions.
6. **Consistency Across the Organization.** Customers should experience "One City, One Customer" regardless of department or service area.
7. **Reuse before buying, buy before building.** Use existing platforms and solutions before replacing. And look to buy solutions rather than build in-house.
8. **Measure and Improve.** Digital and customer service performance should be measured, monitored and continuously improved over time.

The principles are designed for internal use by City leadership and staff as they conceive, plan and execute initiatives identified in this Strategy and conduct work to implement new and re-design existing services.

For each decision made as part of a project or initiative, leaders and teams can check directions, strategies, tactics, their own behaviours and actions against the principles to ensure that they are following the spirit and intent of this Strategy.

For instance, when launching a new service, project leaders can ask “Are we designing this to be a digital service from the outset?”, or “Have we sought the input of users of this service before we design and implement a change?”

By actively and consistently using and applying these principles, leaders can gradually change the organizational culture so that every time a service or a new technology is introduced or redesigned, it is done the right way.

5.4 The Six Workstreams

The implementation of the Strategy is organized into six workstreams: four focused on **what** needs to be delivered and two focused on **how** it will be delivered. Together, these workstreams provide the structure required to achieve the City's vision.

The What:

1. **Customer Forward.** Investments in the establishment of Service North Bay, the unified front door for the City's public-facing services.
2. **Digital Solutions.** Investments in critical online, public-facing tools such as a new website, CRM, expansion of online services, online payments and the digitization of forms.
3. **Business Solutions.** Important investments in corporate systems to drive organizational efficiency and effectiveness, while supporting the connection between office and mobile work and enhanced customer experiences. This includes systems to support human resources, finance, procurement, tax system updates, work and asset management, permits and licences, records management and recreation facility booking and program registration – some of which are already underway.
4. **Foundational Technology.** A set of key investments in foundational technology to modernize and secure the City's corporate network, storage, and computing infrastructure to take advantage of cloud capabilities, to update telephony, implement a robust identity management approach, and further advance integration capabilities.

The How:

5. **Governance.** Establish the critical, executive-led, decision-making, prioritization and oversight and delivery framework to ensure this plan will be executed, that projects and initiatives are funded and resourced, and which connects and integrates all of the workstreams.

6. **Delivery Capability and Capacity.** Investment in the necessary people, skills, training, and a new operating and organizational model to deliver on this plan.

The remainder of the report explains in more detail the work in each of the six workstreams, before laying out the detailed implementation plan.

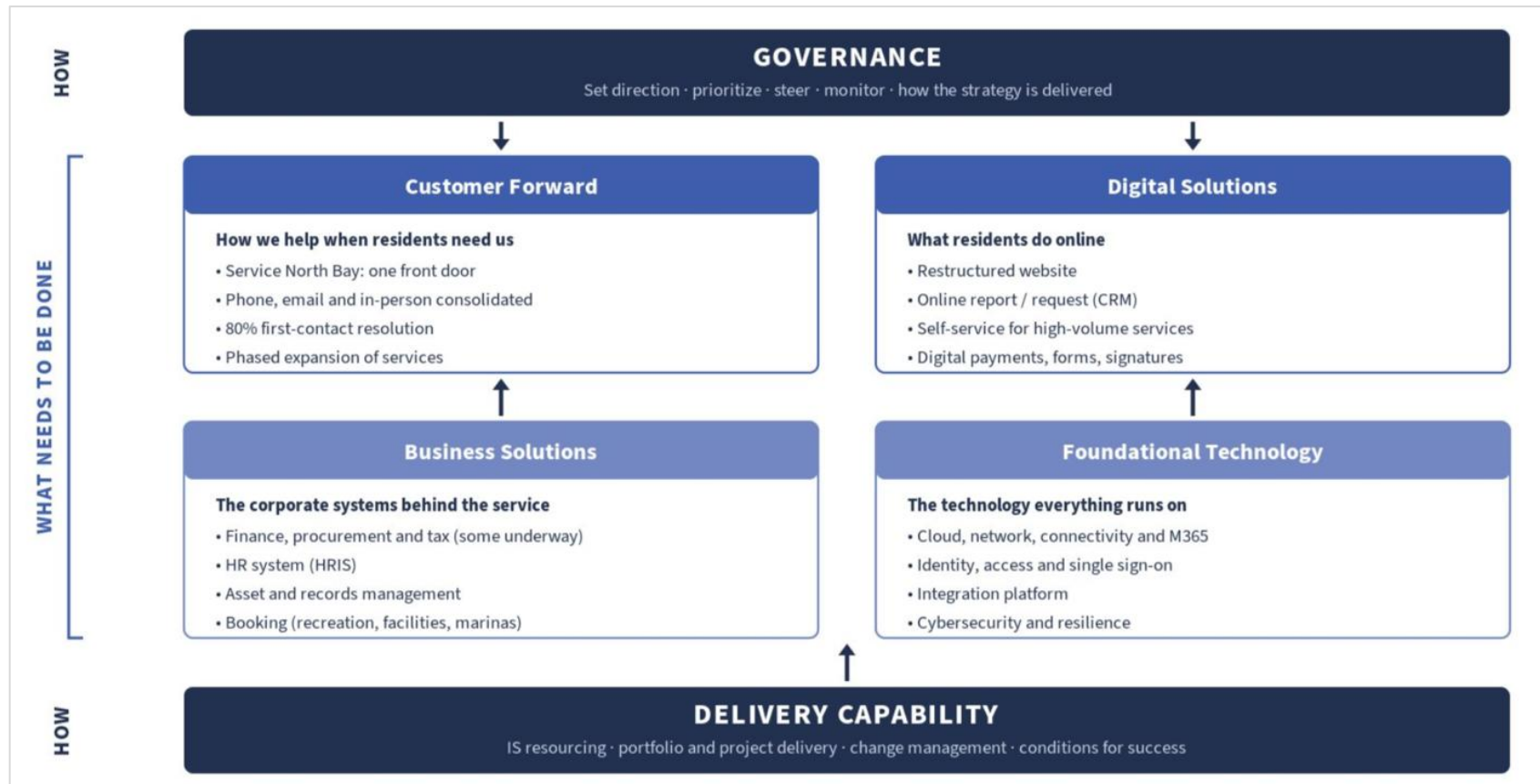


Figure 5: Strategy at a glance – a visual overview of the Strategy

6.0 The Service North Bay Model

Customer Forward is the largest and perhaps most foundational workstream in the Strategy.

This chapter lays out the work planned for Customer Forward and the implementation of the Service North Bay model which is central to modernizing and improving customer service, the commitments and standards that will guide day-to-day service operations, the phased rollout, the resource requirements and operational changes required, and the supporting technology decisions that go with it.

6.1 Model Overview

Service North Bay is envisioned as a single, consolidated contact centre (or front door) for the City. It is the City's equivalent of ServiceOntario or Service Canada. Both have proven the consolidated service model at the provincial and federal level, which many municipalities have emulated. Residents will recognize the experience: one place to go, one consistent standard of service regardless of underlying department.

This is intended to replace fragmented department-by-department service with a central contact centre team operating under a re-defined brand, and in time satellite services at other City locations under the same brand.

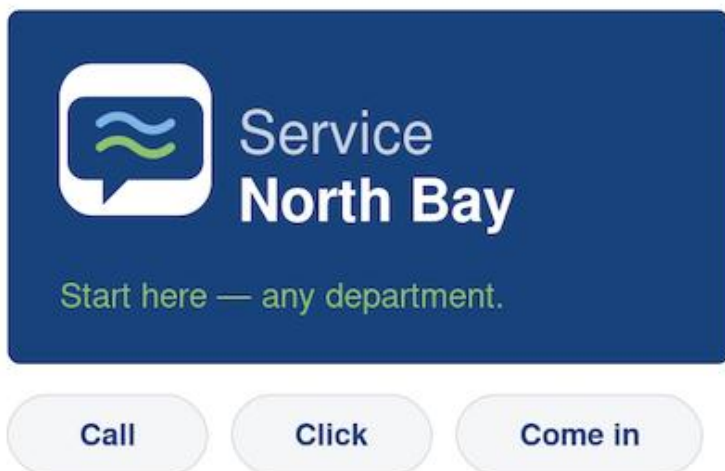


Figure 6: Illustrative Service North Bay branding

It is built around the existing customer service team and includes:

1. **One contact centre team.** A team of multi-skilled customer service professionals.

2. **One primary location.** Consolidated front-facing customer service counters on the main floor of City Hall, with a longer-term vision of satellite locations at other City facilities.
3. **One phone number.** A single general phone line for all City services – advertised and promoted as the number to reach the City.
4. **One email address.** A single general email address to reach the City.
5. **One website.** A primary website where all City services can be found.

In this model, well-trained, professional customer service staff supported by technology including a CRM, modernized telephony and an updated City website will be the first point of contact for people contacting the City.

The team will field calls, walk-ins, emails and respond to web inquiries and requests. The goal is to resolve 80% of general inquiries at that first point of contact.

When necessary and based on agreed standards, the Service North Bay staff will hand off to an expert (a planner, engineer or inspector) in the respective business area to handle the inquiry. This handoff and resolution will be tracked in the CRM. This reduces interruptions for expert staff with routine inquiries, while ensuring that those best equipped to deal with customer service can do so – and ensures that the request is tracked to completion.

It is important to note that inquiries are always triaged and prioritized at the point of intake by Service North Bay using a four-tier ranking, ensuring that high priority and urgent items always get the response required:

1. Health and safety.
2. Urgent service complaints.
3. Service complaints.
4. Information requests.

The Service North Bay team will own the corporate service standards which are presented in the next section and will be responsible for monitoring and reporting performance against the standards for itself and across the organization – where services are delivered locally – to leadership through governance, discussed later in the report.

6.2 Phased Rollout of Service North Bay

In practice Service North Bay will roll out in three phases. Phase 1 is specifically designed to prove the model, build confidence, and grow incrementally. It starts by building on what the City already has with the customer service team, before progressively bringing in new services where first contact resolution can be achieved from respective departments in subsequent phases.

Phase	Focus	Services
Phase 1: Foundations	Establish the model, prove the operating concept	General inquiries, complaints, and payments for a broad range of City services, including Finance; Parking Services; By-law Inquiries and Enforcement; Parks, Arts, Culture and Recreation; service standards in place; CRM for service request intake; website refresh
Phase 2: High Volume	Extend to the highest-volume departments	Expansion to Public Works; Transit Services; Environmental Services; Clerks Recreation registrations with new software; updated after-hours model; extended hours under consideration
Future Phases	Round out the model	Expansion to Sewer and Water Department; Service North Bay satellite counters at other locations, such as at arenas and recreation centre; full CRM implementation; Customer Experience as a corporate lens

Phase 1 and 2 can be staggered as 1A, 1B, 1C and 2B, 2B, 2C if the project team and Senior Leadership Team determine that a more cautious, iterative approach reduces operational risk.

Services shifted into Service North Bay from Departments will be those that can typically be resolved at first point of contact with inquiries of a more complex nature being transferred or referred to the Department for resolution.

Each service brought into Service North Bay must have a set of prerequisites in place before the transition: updated website content, knowledge base information updated, signed Operating Level Agreement between Service North Bay and the business unit, CRM call types and escalation channels configured, and staff training completed.

In terms of physical space, the major front-facing counters should be consolidated on one floor to create a single service area near the current main entrance, which is easily accessible and where customer parking is located.

Note that at Phase 1 Service North Bay will continue to operate around standard City business hours, 8:30 a.m. to 4:30 p.m., Monday to Friday. Only after Phase 1 is launched successfully and the website, FAQs and CRM are operating reliably, can the City consider introducing an extended service model or updated after-hours service.

6.3 Service North Bay: Staffing and Roles

Service North Bay will be resourced by multi-skilled Customer Service Associates who can work with customers across all topics and channels - supported by a small number of specialist roles.

The operating model depends on:

1. A single accountable lead responsible for the day-to-day operation of Service North Bay, the service standards and performance against them, and the relationship with business units.
2. A front-line team of multi-skilled Customer Service Associates with clear roles and responsibilities that include customer-centric and digital competencies, cash handling, de-escalation, multi-channel capability, and cross-training for resilience.
3. Supporting specialist capacity for website content and for the technology that powers Service North Bay, drawn from Communications and Information Services.

Detailed workforce planning, capacity assessment, and organizational design activities will be completed during implementation.

6.4 The Standards

To set expectations and tone for how the City delivers service consistently and to a high standard, drawing on industry best practices, the City has identified a public-facing customer promise, staff-facing service commitments and a set of standards and performance targets.

6.4.1 Customer Promise

The Customer Promise is a public-facing commitment that describes what residents, businesses and visitors can expect from the City:



Customer Promise

As part of our customer promise we pledge to treat customers with respect, keep customers informed, and to make it easy to deal with us at all times.

We will always work to:

- 1 Put customers' needs at the heart of what we do.
- 2 Listen, be helpful and polite, and treat you fairly and with respect.
- 3 Use plain language, not jargon.
- 4 Be open, upfront, and explain our decisions.
- 5 Provide information in accessible formats that meet individual needs.
- 6 Provide information about our services that is useful and updated online.
- 7 Let you know whether we are meeting customer standards on a regular basis.
- 8 Use your feedback to help us make decisions and improve services.

Hold us to it.

We publish how we are doing against these standards, and every complaint is logged, answered and counted.

Reach us however suits you:

Call

Click

Come in

705-474-0400
northbay.ca/service

Call. Click. Come in.

Service North Bay · City of North Bay

Figure 7: Draft Customer Promise to be finalized as part of implementation

The promise will be finalized with the Service North Bay team and can be published on the City website, included in customer service scripts and templates, and reviewed annually as part of the service standards refresh.

6.4.2 Service Commitments

In support of the promise, the following service commitments set the operating standard for all staff who interact with customers. This is how the City expects every member of staff to behave when interacting with customers and the community.

1. **No Wrong Door.** Customers can reach the City through any entry point and be connected to the right help. Staff own the handoff, not just the initial contact.
2. **Respect Every Time.** Every interaction, regardless of channel, is conducted with courtesy, care, and clarity, free from jargon.
3. **Acknowledge Promptly.** Every inquiry gets acknowledged within a defined timeframe. Customers should never wonder whether their message was received.
4. **Respond Fully and on Time.** Responses are complete and within a defined timeframe. If the City cannot meet the timeframe, the customer is provided an update.
5. **Keep Customers Informed.** Customers do not have to follow up with the City for updates. Progress and next steps are communicated proactively.
6. **One Interaction, One Record.** Customers give information once. Staff access interaction history so customers do not repeat themselves, regardless of who they contact.
7. **Professional Presence.** Staff present as identifiable, prepared City representatives, on time, properly identified, and leaving a good impression.

6.4.3 Service Standards and Targets

Finally, service standards lay out how staff should respond to emails, voicemails and mail which set the expectations and timelines for City responses, and for updates when a standard timeline cannot be met. A copy of the standard is included in [Appendix B](#).

Additionally, Service North Bay will be responsible for formal reporting against customer service performance, including performance against industry standard benchmarks, such as:

1. 80 percent of in-scope customer requests resolved at first contact.
2. 80 percent of calls answered within 30 seconds.

3. Abandonment rate below 10 percent.

These targets will begin to apply once Service North Bay Phase 1 is operating with the technology, training, and staffing in place to support them.

6.5 Supporting Technology

Service North Bay depends on several supporting technology capabilities, which are discussed in later chapters. The key capabilities are:

1. **Customer relationship management.** PSD Citywide is recommended as the near-term CRM foundation. This will meet the City's initial needs, follow the principle of reuse and allows the City to fully understand its requirements before making any significant investment in a more sophisticated CRM solution.
2. **Website as a customer service platform.** The website is treated as a customer service channel rather than a communications brochure. Service North Bay, Information Services and Communications jointly govern the website, web content and service journeys, with web content owned by Communications and refreshed against the North Bay Service List.
3. **Knowledge base.** An online reference for frontline staff: who does what, service scripts, escalation contacts, accurate program information. This is to be a combination of the new website and PSD Citywide operating as the City's CRM. Built ahead of Phase 1 launch and maintained by the business units with Service North Bay as the editorial lead.
4. **Telephony.** Modern call centre telephony with attended transfer capability, call tracking, call-back options, real-time and historical data, after-hours routing, and the option for extended hours as Service North Bay matures. Replaces the current outdated phone system.
5. **Payment processing.** Standardized digital payment capability across the organization (credit, debit, e-transfers). The preferred channel remains online self-service.
6. **Back-office system access.** Controlled access to key back-office systems (Recreation, Finance, By-law) so Customer Service Associates can resolve inquiries at first contact rather than escalating to specialists.

6.6 Voice of the Customer

In time, Service North Bay will also become the corporate home for the "Voice of the Customer" program. The Voice of the Customer (VoC) is the process of capturing residents' and service-users' feedback, needs, and expectations to guide how a municipality designs and improves its programs and services. The function does not exist today, and its establishment is one of the visible Future Phase outcomes.

The function carries four ongoing activities:

1. **Customer satisfaction measurement.** A simple, consistent satisfaction signal collected at the end of every digital service and at the close of contact centre interactions.
2. **User research and testing.** Talking to and watching customers use City services as inputs to service redesign. Borrowed from the design methodology that digital leaders use, applied at North Bay's scale.
3. **Personas and customer segments.** A small number of named customer personas that the City designs services around, refreshed periodically. For example, a working parent who wants to register for recreation and pay bills online outside business hours, a senior who prefers phone or in-person help, or a small business owner who needs status updates on permits and licensing.
4. **Target Customer Experience.** A defined picture of what excellent customer service looks like at the City of North Bay, used as the design target for service improvements rather than an after-the-fact measurement.

These activities only begin to scale up as Service North Bay matures, and while they are included in the Future Phase some initial foundations (e.g. satisfaction monitoring for digital services) are built earlier so the foundations are in place.

7.0 Digital Solutions

Digital Solutions is the workstream that puts the City's services online and in front of customers so that they can self-serve. This area includes the website, public-facing portals, online services that support customer transactions, and the supporting digital capabilities that power them.

We recommend that the City also apply the Service North Bay branding to the City's digital services, to help build brand recognition and trust.

7.1 New City Website

The City needs a new website, and the website must evolve from a communications platform into a service delivery platform. northbay.ca should be where residents get things done, not where they learn how to get things done, where to go and who to call.

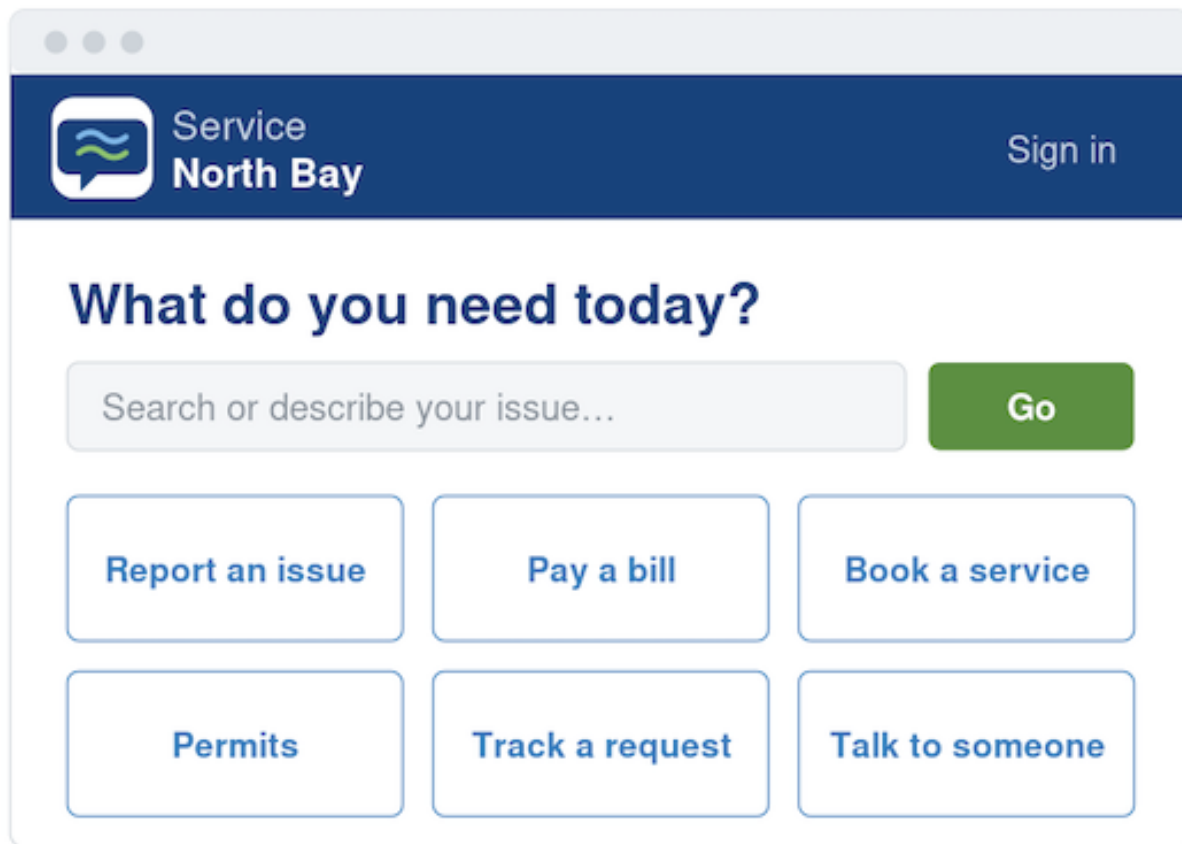


Figure 8: Service focused website helps customers get things done

But modernizing the website is more than swapping the platform that it runs on. It requires three connected changes at once: the underlying platform (the CMS), the information architecture and content (how services are organized and explained), and the operating model (how the website is owned, governed, and refreshed over time).

7.1.1 Website Platform Modernization

The City's current website software is near to official end-of-life status, and this represents an opportunity to move to a cloud model for web delivery. Procurement of a hosted CMS replacement is a high-priority item and already underway.

The website modernization runs through five sequenced stages:

1. **Stabilize the current web environment.** Apply security patches and supporting fixes during the transition period. This has already been completed.
2. **Decide on the platform.** Two paths are being assessed: ability to extend an existing contract to cover the corporate website, or a market RFP for a hosted commercial CMS.
3. **Lock in budget and resources.** Capital approval, dedicated project team, and a vendor-led or in-house implementation choice.
4. **Implement and migrate.** Configure the chosen CMS, design the templates, migrate content, integrate with systems and tools, set up site search.
5. **Launch and stabilize.** Decommission current CMS platform. Maintain a read-only legacy archive during transition. Run web-page redirect strategy to avoid broken links.

Microsites, such as Fire and Economic Development, should be migrated into the main City site as part of the launch. A proposed web specialist intern role in Communications will be needed to support the content migration and redesign work.

7.1.2 Website Content Redesign

Replacing the web platform is necessary, but website content must also be redesigned around what customers are trying to do rather than the City's internal structure.

Content redesign covers four work areas:

1. **Task-based user research.** Talking to and watching customers use the current website, naming what they are trying to do, and naming what gets in the way.
2. **Redesigned information architecture.** Navigation and content structure built around the reusable service patterns (Get Information, Request, Tell, Apply, Register, Book, Pay, Check Status, Be Notified).

3. **Plain-language content rewrite.** Priority service content rewritten to a Grade 6 reading level. Style guide, templates, and quality benchmarks established for ongoing content.
4. **Content operations.** Review cycles, update responsibilities by department, accountability for accuracy. The Web Content Specialist is the editorial lead with oversight from the existing Communications Officer.

7.1.3 Web Operations

In transitioning the City website into a customer service tool, a new operating model is required.

The recommended joint operating model is a best practice approach that brings together Information Services (the platform), Communications (editorial standards and overall content), Customer Service (the service experience and priority service journeys), and the departments that own the underlying service information and keep it current.

A continuous feedback loop keeps the website accurate: frontline staff pass along the questions they hear and the problems customers report, so content is updated to reflect real demand.

7.2 Priority Services to Move Online

The North Bay Service List (NBSL), developed in the discovery phase of the project, identifies all of the City's customer-facing services, their service owners, the number of annual transactions completed and their current state of digitization.

The work identified 81 Extra Large services (more than 10,000 annual transactions each) and 108 Large services (1,000 to 10,000) at the City today; approximately 200 services that are strong candidates for moving online.

We have used this information to identify priority services for the City to offer online. Moving forward, the City can maintain and enrich the NBSL and use it to enhance and prioritize the next batch of online services.

7.2.1 CRM Integrated Online Request / Report

Service requests and reporting problems are the highest volume patterns of transactions that we see across all departments. Customers make requests and reports to all departments - a streetlight outage, an overflowing park bin, a broken toilet at a facility, an unpermitted fire or deck.

By implementing a single online service that captures service requests and reports and automatically feeds them into the CRM used by Service North Bay, the City can rapidly digitize a wide range of municipal services. Residents would be able to submit requests anytime, from anywhere, using their preferred device, including quickly reporting issues by simply taking and uploading a photo.

Keeping customers informed proactively of the receipt of a request, and the expectations for further action and communications is part of the CRM capability and it reduces the number of wasted calls to the City to check on status.

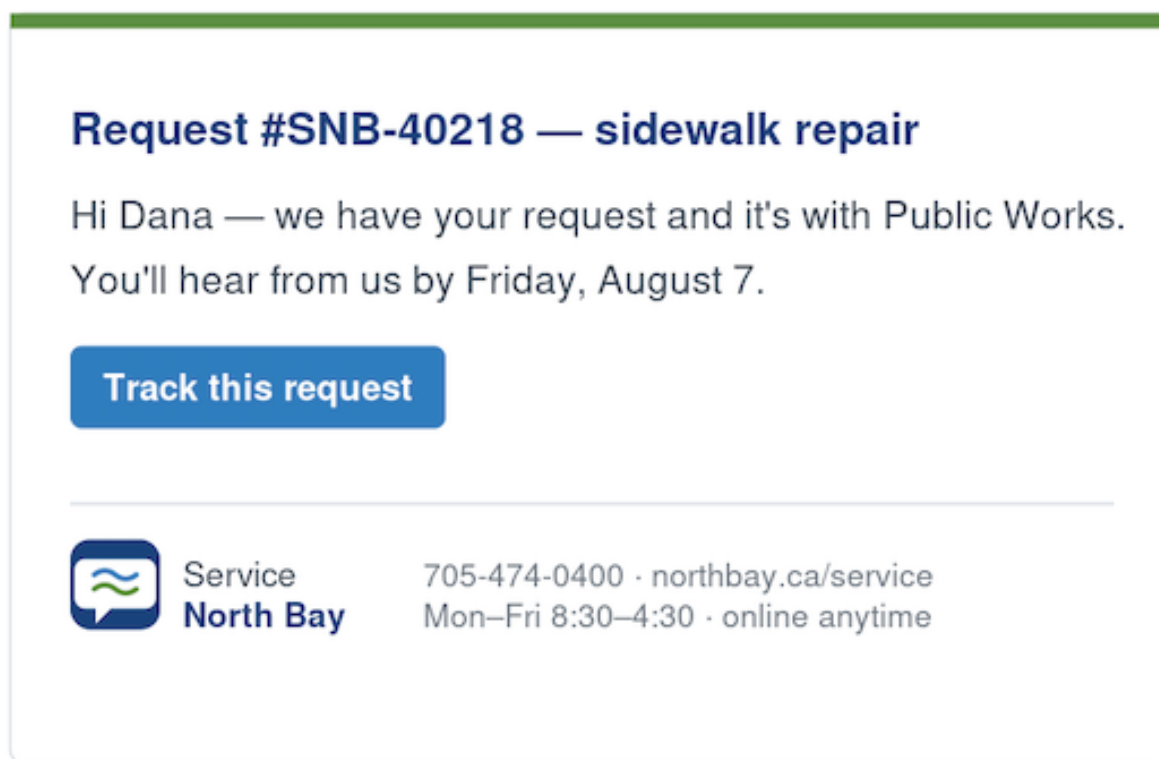


Figure 9: Proactive notifications prevent unnecessary contacts to check status

After the website update, this is the City's next top digital priority.

7.2.2 Other Priority Digital Services

The other digital priority targets, listed below, for digital improvement (drawn from the MSL volume tiers) focus on the services that produce the highest customer demand:

1. **Recreation, facility and parks rentals.** Facility booking and program sign-ups moved online with search and availability, payment and promotion.
2. **Tax billing portal.** Access a portal to access billing history, prior bills, download certificates and sign up to payment plans.

3. **Parking.** A variety of parking improvements including the ability to apply for and renew a permit, extend parking, and dispute a ticket – in addition to the already available parking ticket payment option.
4. **Business licences and other permits.** Ability to apply and renew business licences, including submitting required documents, proofs and payments, as well as launching other online permits – such as the soon-to-be-launched Burn Permit.
5. **Transit.** Pay for and book accessible transit trips, and a lost and found service that can be used across facilities, parks, and transit.
6. **HR Recruitment.** Simplify the application process by making an online Applicant portal available for applying for City jobs.

When the City has worked through these priorities, it can return to the NBSL to drive the selection of the next high-value candidates.

7.2.3 Reusable Service Patterns

The City's digital services are built from a small set of reusable patterns rather than custom-designed for every service.

Common municipal patterns for digital service design include:

- **Get Information.** Find out about a service or program.
- **Request a Service.** Report an issue, request action.
- **Tell.** Provide feedback, file a complaint.
- **Apply.** Apply for a permit, licence, or program.
- **Register or Log In.** Set up an account, manage profile.
- **Book.** Reserve a facility, program, or appointment.
- **Submit Documents.** Upload supporting documents.
- **Pay.** Settle a bill, pay a fine, pay for a service.
- **Check Status.** Track progress of a request.
- **Be Notified.** Receive updates, alerts, or reminders.

These patterns translate into reusable technology capabilities that can be combined to build additional digital services. Once "Pay" is built, every service that needs a payment step uses the same capability. This compounding effect is what makes pattern-led design more efficient than custom-building each service individually.

The City, led by the IS Director with their responsibility for architecture will develop reusable digital capabilities that can be leveraged across multiple services. This approach will reduce duplication, improve efficiency, accelerate the delivery of new services, and ensure a consistent customer experience across all digital channels.

7.3 Digital Payments, including Policy

Modern digital payment is a prerequisite for moving many City services online and has been a source of frustration for some City online services that launched without online payment acceptance. Most priority services in the section above rely on payments in the workflow.

North Bay's current state (limited online payment, no mobile wallet support) does not meet 2026 customer expectations. The Strategy recommends that the City should:

1. Adopt a corporate payment acceptance policy covering credit, debit, e-transfers, tap to pay, Apple Pay, and Android Pay.
2. The City should review user fee cost structures to standardize how payment processing fees are recovered, whether directly from users or within applicable fees, and support a consistent, transparent approach across user-fee by-laws.
3. Modernize counter payment acceptance at Service North Bay counters.
4. Implement a configurable, reusable online payments capability as a corporate platform, so each service that needs a payment step uses the same component.

7.4 Digital Signatures, including Policy Updates

The City should also embrace digital authorization and digital signatures over requiring wet or physical signatures. Policy updates are required to lay out where online workflow approvals are satisfactory and when formal digital signatures are necessary.

The City will also need to purchase and implement a digital solution, such as DocuSign, to support contract management, real estate transactions and other processes which require secure digital signatures.

7.5 Forms Standardization

Forms are another area where digital services break down today. Customers fill in a PDF, print, scan and send it in to City Hall.

The proposed hosted CMS will include built-in online forms functionality and is expected to meet the City's forms requirements for the foreseeable future, eliminating the need for a separate forms platform.

The Strategy recommends taking a coordinated approach to the City's forms, covering:

1. **Forms inventory.** Catalogue every form currently in use across the City.
2. **Forms standard.** Establish a consistent format, structure, and accessibility standard, supported by the bundled forms software.

3. **End-to-end digital lifecycle.** Intake, workflow, signatures, confirmation, all digital, all integrated to the back-office.
4. **Migration sequencing.** Highest-volume forms move first, aligned with the priority service journeys.
5. **PDF use guidelines.** Defined cases where PDF is appropriate (rare) versus where digital intake is preferred.

In practice, PDF forms are a poor fit for digital service delivery. They cannot validate input or route to back-office systems and workflows, and they generate manual handling at the City's end. Where PDF is still used, it should be the exception with a clear reason.

7.6 Public Engagement Platforms

After refreshing the website, the City should investigate public engagement platforms to support improved consultation and resident input. Modern engagement platforms (Bang the Table, Social Pinpoint and similar) enable structured online consultation, surveys, and feedback at scale.

The investigation determines whether a dedicated engagement platform is required, or whether the new website and supporting tools cover the need adequately. If required, implementation of an engagement platform proceeds.

7.7 Digital Service Promotion

Digital services do not adopt themselves. Active promotion is required to reach the 80 percent corporate digital adoption target that is set in this Strategy for all City digital services.

There are various tactics that the City can adopt to promote digital adoption including:

1. Frontline staff promote digital options.
2. Cross-promotion on City-owned web properties.
3. Promotion on City vehicles, transit, and stops and stations.
4. In-facility promotion at all counters and locations.
5. Inserts in letters and bills.
6. Social media promotion.
7. Display ads with local media.

Adoption should be tracked, reported and tied back to the promotion tactics to identify what works.

8.0 Business Solutions

Business Solutions is the workstream that covers the corporate systems that underpin the City's core business processes.

As noted earlier, the City cannot deliver digital services if it hasn't digitized its processes. This is where the City focuses on optimizing and digitizing business processes. These solutions are foundational to operational excellence and efficiency and underpin digital services.

The City's business solutions enable staff to deliver municipal services, from issuing permits and processing invoices to managing payroll. While some systems, such as PSD Citywide for planning and permitting, are well-used and well-adopted, and effectively support operations, others are underutilized, approaching end-of-life, or in need of replacement.

This chapter lays out the strategic areas of focus that the City should apply over the next five years to modernize, drive internal efficiency, improve staff experiences and underpin effective digital services.

8.1 Resetting the Enterprise Resource Planning (ERP) Strategy

The City has been planning for the replacement of its ERP systems for some time. However, this Strategy proposes a significant shift in direction from previous assumptions and therefore requires additional context and rationale.

8.1.1 Background and Context

ERP implementations are among the largest and most complex technology initiatives organizations undertake. They require significant financial investment, substantial staff involvement, and extensive organizational change management. As a result, these projects frequently fail to achieve their intended budget, schedule, scope, or business outcomes. Gartner estimates that 55-75% of ERP projects fail² to meet their objectives, while Panorama Consulting reports that 50-60%³ exceed budget and experience implementation delays.

² <https://www.randgroup.com/insights/services/solution-implementation/what-percentage-of-erp-implementations-fail/>

³ <https://www.panorama-consulting.com/panorama-consulting-group-releases-latest-study-of-erp-implementation-outcomes-across-the-globe/>

In the municipal sector, ERP often has a different meaning than it does in private-sector organizations. Unlike manufacturers, retailers, or distribution businesses, which may operate a relatively focused line of business and manage core operations through a single enterprise platform, municipalities deliver a diverse range of services across multiple lines of business. Consequently, municipal operations are typically supported by a combination of core enterprise systems and specialized applications, each providing capabilities tailored to specific service areas. The challenge is therefore not to consolidate all functions into a single system, but to ensure these systems work together seamlessly to support efficient operations, shared data, and a consistent customer experience.

Upon starting work with the City, the consulting team recommended that the City not proceed with a large ERP project at the time. We argued, and stand by this argument, that the City does not have sufficient experience running these kinds of large-scale transformation projects, which significantly raised the already high risk of ERP failure.

At the outset of this engagement, the consulting team recommended that the City defer a major ERP replacement initiative. This recommendation reflected the significant risks associated with large-scale ERP implementations and the City's limited experience delivering enterprise-wide business transformation projects of this magnitude.

An additional factor influencing this recommendation is the broader municipal ERP market. Many municipalities implemented finance and human resource systems during the early 2000s and are now approaching end-of-life replacement cycles. For example, Microsoft has announced the end of support for Dynamics GP (Great Plains) in 2029. As a result, many municipalities are entering the market simultaneously to procure replacement solutions.

This increased demand, combined with a limited pool of qualified vendors and implementation partners, is driving higher costs and increasing procurement and implementation risks for organizations pursuing large-scale ERP replacements.

8.1.2 Modern ERP Strategy

ERP emerged in the 1990s as a strategy for integrating an organization's core business processes and data within a monolithic enterprise platform. The objective was to create a unified system capable of supporting functions such as finance, human resources, procurement, and other administrative operations. While this approach can provide standardization and integration benefits, large ERP platforms are often complex, costly to implement, and difficult to adapt as organizational needs evolve.

In recent years, many organizations have moved toward a composable ERP approach. Rather than relying on a single enterprise application, composable ERP combines a collection of specialized solutions that are integrated through standard interfaces and data connections. This enables organizations to select applications that best meet their business requirements while maintaining a connected and cohesive technology environment.

A composable approach allows business capabilities such as recruitment, performance management, procurement, expense management, or customer self-service to be implemented, enhanced, or replaced independently as needs change. This reduces the need for large-scale system replacements and allows organizations to modernize incrementally rather than through a single, highly disruptive transformation initiative.

For the City, a composable ERP strategy offers several advantages. It reduces the size, complexity, and risk of individual implementation projects while lowering dependence on a single software vendor. It also allows investments to be prioritized based on business need, enabling departments to adopt new capabilities at a pace that aligns with their operational priorities and available capacity. Most importantly, it provides a practical pathway to modernize critical business functions while avoiding many of the risks associated with a traditional enterprise-wide ERP replacement.

Given the City's current project delivery capacity, competing transformation priorities, and existing technology investments, a composable ERP strategy represents a lower-risk and more flexible approach to achieving the City's long-term ERP objectives.

8.1.3 The North Bay Situation

One of the guiding principles of this Strategy is "Reuse before buying, buy before building." This principle encourages the City to maximize the value of existing technology investments before pursuing major system replacements. Where current solutions can continue to meet business needs through modernization, optimization, or targeted enhancements, those options should be considered before undertaking a more costly and higher-risk replacement initiative.

The City currently operates a mature finance and taxation platform through NaviLine. The system supports many of the City's core administrative functions, including payroll processing, financial management, taxation, accounts management, and financial reporting. While NaviLine may not offer every capability available in other cloud-based ERP platforms, it remains a functional and strategically viable solution capable of supporting the City's financial operations for the foreseeable future.

Importantly, NaviLine is not a stagnant or end-of-life platform. CentralSquare continues to invest in the product through its modernization roadmap, most notably through the introduction of NaviLine Impact, the next-generation evolution of the platform scheduled for release in 2026. Planned enhancements include a cloud-based platform, a modernized user experience, single sign-on capabilities, artificial intelligence (AI)-enabled workflows, integrated mobile applications, and deeper integration across the broader CentralSquare product ecosystem.

CentralSquare has also made substantial investments in citizen-facing digital services. Enhancements include a unified citizen portal that supports online tax and utility payments and property tax access. These investments reflect a broader market trend toward improved digital service delivery and demonstrate the continued evolution of the platform. In fact, some municipalities that do not use NaviLine as their core ERP platform have adopted Central Square's Citizen Tax Portal to provide residents with online access to tax information, payments, and other self-service capabilities.

In contrast, the City does not currently have a comprehensive HRIS. As a result, several high-volume business processes, including recruitment, scheduling, time and attendance management, training and certification tracking, and other workforce administration activities, remain highly manual and labour-intensive. These activities consume significant staff capacity and limit the department's ability to focus on higher-value strategic and employee support functions.

Accordingly, the City's most significant business capability gap is not within Finance, but within Human Resources. Addressing this gap should be prioritized as the next phase of the City's modernization efforts.

8.1.4 The Strategy

Although the City is working on developing new project delivery capabilities and capacity – it's still not ready for a major monolithic ERP implementation. Furthermore, this Strategy has identified a massive backlog of project work which would need to be held until an ERP project is completed – thus delaying customer-facing service improvements which are critically needed.

Our advice is: yes, the City does need a functional set of Finance and HR ERP capabilities, but it doesn't need to buy a single ERP solution to address its needs – following the composable ERP strategy.

Based on the assessment outlined above, the City should adopt a composable ERP strategy rather than pursue a monolithic ERP replacement or implementation.

The City's most significant business capability gap is in Human Resources. As a result, the immediate priority should be the procurement and implementation of a modern HRIS that integrates with the City's existing Finance system, NaviLine.

We recommend that the City retain NaviLine as its primary Finance and Tax management solution for the next four years while pursuing targeted modernization initiatives. During this period, the City should focus on maximizing the value of its current investment, improving financial processes, and implementing priority self-service and automation capabilities.

At the conclusion of the fourth year, the City should conduct a formal review of its finance and tax management requirements, including a fit-gap assessment and market scan, to determine whether continued investment in NaviLine remains the preferred option or whether a replacement strategy should be pursued.

This phased approach addresses the City's most pressing operational needs, reduces implementation risk, minimizes disruption to ongoing service improvement initiatives, and preserves flexibility for future technology decisions.

In the immediate term the City should move quickly to procure and implement an independent modern HR information system that fully integrates with the NaviLine finance system.

A modern HRIS should include:

1. Centralized employee records, job classifications, and org structure.
2. Position management and org chart visualization.
3. Onboarding and offboarding workflow automation.
4. Benefits administration and enrolment tracking.
5. Shift scheduling and schedule management.
6. Clock-in/clock-out via web, mobile, or physical terminals.
7. Timesheet approval workflows with absence and leave management.
8. Learning management and certifications.
9. Performance management including goal setting, reviews, and competency tracking.
10. Payroll-ready data exports and integration with payroll and ERP systems.

Funds for both initiatives are available in the already funded ERP project which can be used to fund staffing and staff backfill, consulting/advisory services, and products and implementation services.

This composable approach addresses the City's most pressing business gaps, reduces implementation risk, and delivers benefits more quickly.

8.2 Planning, Permitting and Licensing Expansion

The City has implemented PSD Citywide for Planning and Permitting. This is a model implementation that has digitized internal processes while making the services available digitally to customers to apply and manage applications online.

There are ongoing enhancements that the City can make, and it will continue to listen to customer feedback to identify ways to improve. Nonetheless, the outcome is a model to be replicated elsewhere.

PSD Citywide is a platform that can be used for planning, permitting, licensing, bylaw and various other areas. Following the principle of Reuse before buying, buy before building, the City plans to expand the use of PSD Citywide into other permit types (burn permits are currently being set up in PSD Citywide) for bylaw and enforcement, business licensing and various other permits and licences.

This has the added benefit of being pre-integrated with the CRM system – proposed to also use PSD Citywide – so that service requests and complaints can easily flow into these teams directly.

8.3 Work and Asset Management

The work that the City does to install, maintain and replace assets (e.g. water, road, fleet, and facility assets) is managed in various purchased and internally developed work and asset management systems. The City's work and asset management capability is currently built across more than five different work management systems that are separate and non-integrated and in some cases aging. This overcomplicates the environment, creates data and process silos and is costly to maintain, support and integrate.

Service requests from the public typically get passed to a work management system for completion, and operating multiple systems that do the same thing makes integration with the CRM for handoffs more complex and costly.

The City should rationalize its work and asset management systems, and thus the Strategy directs the City to conduct a review of existing work and asset management tools, including Hansen currently in use across the City, with the aim of setting a roadmap to consolidate onto a single platform that supports work orders, asset records, inspections and lifecycle planning, CRM integration, and mobile capabilities.

8.4 Recreation Platform – Facility Booking and Program Registration

The City has a project underway to replace its aged CLASS booking system with a new product, Xplor Recreation. A detailed Fit/Gap Assessment was prepared as part of the vendor selection process to ensure that the needs of the City can be met and that the solution can grow with the City.

The product is used widely by municipalities across Canada, including at Sudbury, Halifax, Newmarket, Milton, Vaughan, and London – and City staff have been in dialogue with Sudbury to learn from their experiences in implementation.

The key features of the platform include:

1. **Facility and rental management** – coordinates space bookings and availability for parks, rec centres, and other municipal facilities.
2. **Online registration and booking** – residents can browse and sign up for programs, classes, drop-ins, and facility rentals themselves, with automatic conflict management.
3. **Facility and program scheduling** – staff can build single or recurring classes, courses, and events across multiple sites from one system.
4. **Membership management** – tracks payment histories, active memberships, and class enrolment for each resident or member.
5. **Payment processing** – handles online and in-person payments for programs, memberships, and rentals.
6. **Communication tools** – voice and text broadcasting for reminders, cancellations, and last-minute announcements to registrants.
7. **Reporting and analytics** – gives staff visibility into usage, revenue, and program performance across the organization.

Ice booking is the first phase of the project, with subsequent phases expanding to other sports facilities, marinas, supporting program and camp registrations in future.

8.5 Microsoft 365, Documents, Records and Collaboration

M365 has been deployed as the City's primary collaboration and productivity platform but has not yet been fully adopted. It's a powerful platform that has lots of potential for the City. The Strategy directs the City to:

1. Assess the City's current use of M365 and develop a roadmap to improve M365 adoption, consistency, and utilization across the organization. Enhance Information Services' knowledge of the platform's full capabilities so they can effectively champion, govern, and promote its use while maximizing the value of the City's investment. Specifically, the roadmap should address:
 - a. **Document management.** Recommend a corporate approach to working documents across shared drives, OneDrive and SharePoint, with clear governance over what content sits where and how the document lifecycle is managed.
 - b. **Records management.** Recommend a new records management system, with a supporting records management plan covering retention, classification and access. This should build on North Bay's existing Microsoft 365 investment.
 - c. **Microsoft Copilot deployment.** Certify and support the use of Microsoft Copilot in line with the coming AI Governance Framework.

8.6 GIS-led Service Opportunities

The City already does good work in GIS and has built a strong enterprise capability around its Esri platform, which is a de facto standard widely used by municipalities.

The opportunities identified below could extend that foundation into customer-facing service rather than building it from scratch. The following are identified as prime opportunities for consideration rather than committed initiatives. Each must be prioritized through the intake and prioritization process, and some, such as plow tracking, need further review before proceeding:

1. **Neighbourhood services.** Digital view of services available at an address.
2. **Development and permits.** GIS-enabled application status, zoning lookups, and inspection booking.
3. **Parking.** Real-time availability, payment, and enforcement.
4. **Winter maintenance.** Service status, clearance progress, plow tracking.
5. **Road closures.** Real-time visibility, integration for navigation apps.
6. **Heritage and walking tours.** Self-guided digital City heritage tours.
7. **Economic development.** Investor-facing GIS tools showing available land, zoning, and demographics.
8. **Data-driven service budget decisions.** GIS surfaces trends in customer activity that can inform budget and future servicing decisions.

The City is well positioned to advance in this area and the City of Barrie is the leading municipal comparator for GIS-led service delivery, and a good source of learning and collaboration for the City GIS team to tap into.

8.7 Other Key Business Solution Initiatives

The MTM assessment points to various other important initiatives that should be undertaken as part of broader modernization – these are captured in the implementation plan. The following are worth highlighting:

1. Implementation of the CriSys Fire Records Management System (RMS) and integration with North Bay Police Service dispatch operations.
2. Transit Solutions modernization. A roadmap for transit fares, accessible transit booking, on-demand services, schedules, and customer-facing apps. Connects to Service North Bay Phase 2.

9.0 Foundational Technology

Foundational Technology is the workstream that focuses on the core technologies that enable, host, and provide all the customer-facing, digital, and business solutions described in the previous three chapters. The City's foundational technologies were assessed in the platform layer in the MTM. Modernizing the City's technology foundations is therefore a critical priority. A more robust, secure, scalable, and agile technology environment will enable the City to better support current operations while remaining responsive to future needs and opportunities.

9.1 Progressively Modernized Infrastructure Platform

The City's IS team will continue to closely review its underlying technology infrastructure with the intent of modernizing the underlying networks, storage, and computing environments. This work ensures that the technologies are fit for purpose, agile, and well positioned to support the modernized digital environment envisioned in the Strategy.

This will require the planned lifecycle replacement of aging infrastructure, alongside an increased adoption of cloud-based services. Over time, the City should follow a deliberate and phased migration strategy that leverages cloud technologies to improve reliability, scalability, security, and operational flexibility.

Additionally, as a part of digitizing internal processes, the City will need field staff, inspectors, and anyone whose work happens away from a desk to be able to access technology in the field and to do their jobs from where the work is, rather than needing to commute back to City Hall or their respective offices.

Modernizing infrastructure will ensure that people will have the necessary tools so they can work from where they need to.

9.2 Corporate Technology Standards

The City's IS Director and team, through the governance model described in subsequent sections, will be responsible for establishing future technology standards and defaults that will drive standardization.

These standards will be incorporated into all future procurements to ensure that the solutions the City buys and implements fit into the City's technology environment.

This is critically important activity that will drive simplification of the technology environment over time, which will in turn result in cost-optimization of the management of the City's technology environment.

9.3 Technology Policy Update and Refresh

Various policies must be developed or refreshed to support the Strategy and protect the City. The IS Director will take the lead on this work, working with partners across the City and through the governance model to achieve the right policy balance that enables staff while protecting the City and the data that it holds. Key policies include:

1. **Acceptable Use of Technology.** Refreshed to cover modern collaboration tools, mobile, and remote work.
2. **Cloud and Hosting.** Cloud strategy, standards, data ownership and residency, security and procurement governance.
3. **Cybersecurity.** Posture, incident response and management, and reporting.
4. **Acceptable Use of Artificial Intelligence.** A draft framework and policy on AI capabilities, and suitable use, under what conditions, with what oversight and with what data restrictions.
5. **Vendor and Procurement Governance.** Procurement standards, vendor of record arrangements, and architecture fit testing.
6. **Data Management.** Master data, data quality, retention, and ownership.
7. **Records Management.** Align records retention with new digital workflows.

These policies should be sequenced through the governance cycle rather than developed all at once.

9.4 Corporate and Contact Centre Telephony

The City's telephony system is outdated, which presents a constraint on the implementation of the Service North Bay model. The Strategy directs the City to replace the current phone system with a comprehensive corporate telephony solution, with capabilities to support a modern contact centre, including:

- Automated menuing that routes callers to the right place.
- Call-back option so residents don't wait on hold.
- Live wait-time monitoring and reporting.
- Self-service (Interactive Voice Response) for routine requests like payments and status checks.

9.5 Integration Platform

System-to-system integration is limited today, which constrains efficiency (resulting in duplicate data entry, reconciliation effort, and errors) and inhibits the customer-facing improvements the Strategy depends on. The Strategy directs the City to:

1. **Develop a corporate Integration Plan** as a named deliverable, anchored by network and system architecture led by the IS Director and IS Team.
2. **Build internal capability before procuring.** The Single Customer Record, CRM-to-business-system flows, and priority service journeys all depend on reliable integration. The City should first leverage existing integration tools and develop in-house competence, then select a dedicated platform once the scope and requirements are clear.
3. **Make integration a stock RFP requirement** (as part of the technology standards noted above) so every new system arrives with the integration capability the City needs built in.

9.6 Artificial Intelligence Adoption Roadmap

AI represents a significant opportunity for North Bay and the municipal sector more broadly – but must be responsibly adopted, guardrails established, and staff trained so that AI is used appropriately and that City obligations around protecting data and privacy can be met.

The City has already developed a draft responsible AI governance framework which is currently under review with SLT, and Microsoft Copilot has been made available to staff.

Expansion of the AI program will follow through a test and learn approach that allows the City to conduct controlled tests and risk assessments to learn the potential and challenges of applying AI to community and business problems that have been difficult to address with traditional technologies.

It is worth noting that many of the vendors of solutions (Finance, HRIS, Planning and Permitting, Work and Assets, GIS, Web CMS) that the City uses or will use in the future are integrating AI into their solutions and the City will assess and take advantage of these opportunities where appropriate.

9.7 Cybersecurity and Resilience

Cybersecurity is a strategic priority for all municipalities, as they are actively being targeted in ransomware attacks. As more services move online, more customer data is captured and as the City becomes more dependent on technology, the risk grows.

In response, the Strategy directs the City to:

1. **Develop a formalized corporate Cybersecurity Strategy and Program** as a named deliverable, covering security operating model, learning and training, audit and review, incident response, business continuity, vendor governance, and the security architecture that supports the City's customer-facing services.
2. **Enhance disaster recovery plans.** Further develop disaster recovery and incident response plans with business units and leadership to determine recovery priorities and determine technical recovery requirements to support the needs.

Cybersecurity and resilience management is a continuous capability rather than a one-time project – and requires an ongoing program, funding and staffing to operate effectively to mitigate the substantial risks that exist.

9.8 Identity, Access and Single Sign-On

The City has already implemented the baseline capability for Single Sign-On (SSO) for staff. SSO allows a staff member to log in once and access multiple systems without repeatedly having to log in.

The Strategy directs the City to continue to establish SSO as a baseline technology standard and extend SSO capability organization-wide as new solutions are implemented and old solutions replaced. This brings value in:

1. **Productivity.** One login for multiple systems (CRM, GIS, email, service portals). Reduces password fatigue and help desk reset requests.
2. **Security.** Centralized identity management with multi-factor authentication strengthens the City's security posture.
3. **Governance and access control.** Standardized access provisioning and de-provisioning as staff move roles or leave.

The same concept that applies for staff can also apply to customers – so the City will also work to establish an SSO approach that allows customers to simplify their interactions and access to City online services.

9.9 IT Service Enhancements

Given that this Strategy commits the City to an increased dependence on technology to deliver services, partnership with departments from IS and support of the technology that staff use must be top-notch.

So, in addition to the projects and initiatives to implement a more robust and scalable infrastructure platform, the City's IS team will also work on enhancements to its services, including:

1. A shift to a full-service IT Service Desk and enhancing its IT Service Management (ITSM) software configuration, to enable self-service for staff via knowledge base, online ticketing and a software catalogue.
2. The creation of an IT service catalogue that clearly identifies the services provided by IS, how to access those services and what to expect.
3. Increased focus on relationship and partnership building between IS and business units.
4. A clear intake process for ideas and opportunities, and visibility into the project portfolio.
5. Stronger project delivery with clearer roles and responsibilities.
6. Formalized agreements with partners around the services provided by IS.
7. Technology standards, mentioned earlier, for use in future procurement to drive technology standardization.

9.10 Turning from What to How

This chapter and the previous three covered “the what” – what projects and initiatives the City must undertake to achieve the vision.

This represents a significant volume of work ahead for the City, which is most likely unprecedented. The work must be effectively funded, resourced and delivered.

So, next we need to turn our attention to “the how” – how the City needs to organize, resource, budget and coordinate this large workplan to be able to effectively deliver it.

The next chapters address the governance and delivery aspects of the Strategy, which positions the City to deliver on the initiatives identified in the preceding chapters.

10.0 Governance Model

As noted, there is a lot of work ahead with potential in the ever-evolving municipal and technology landscapes to be distracted from the Strategy by other incoming opportunities and emerging needs.

This chapter sets out how the City will use a revamped digital, technology and customer service governance model to keep the Strategy on track, make clear, consistent decisions about services, technology and digital investments, and ensure those decisions and priorities stick.

Detailed implementation and operational guidelines around setting up and operating the governance model have been supplied to the City separately; therefore, this chapter is limited to a high-level summary focused on key points.

10.1 Governance Bodies and Decision Rights

The recommended governance at the City of North Bay (see *Figure 12*) exists to align customer service, digital and technology decisions, focus limited capacity on the highest-value priorities, set clear standards and expectations, reduce duplication and workarounds, and ensure accountability for outcomes rather than for projects.

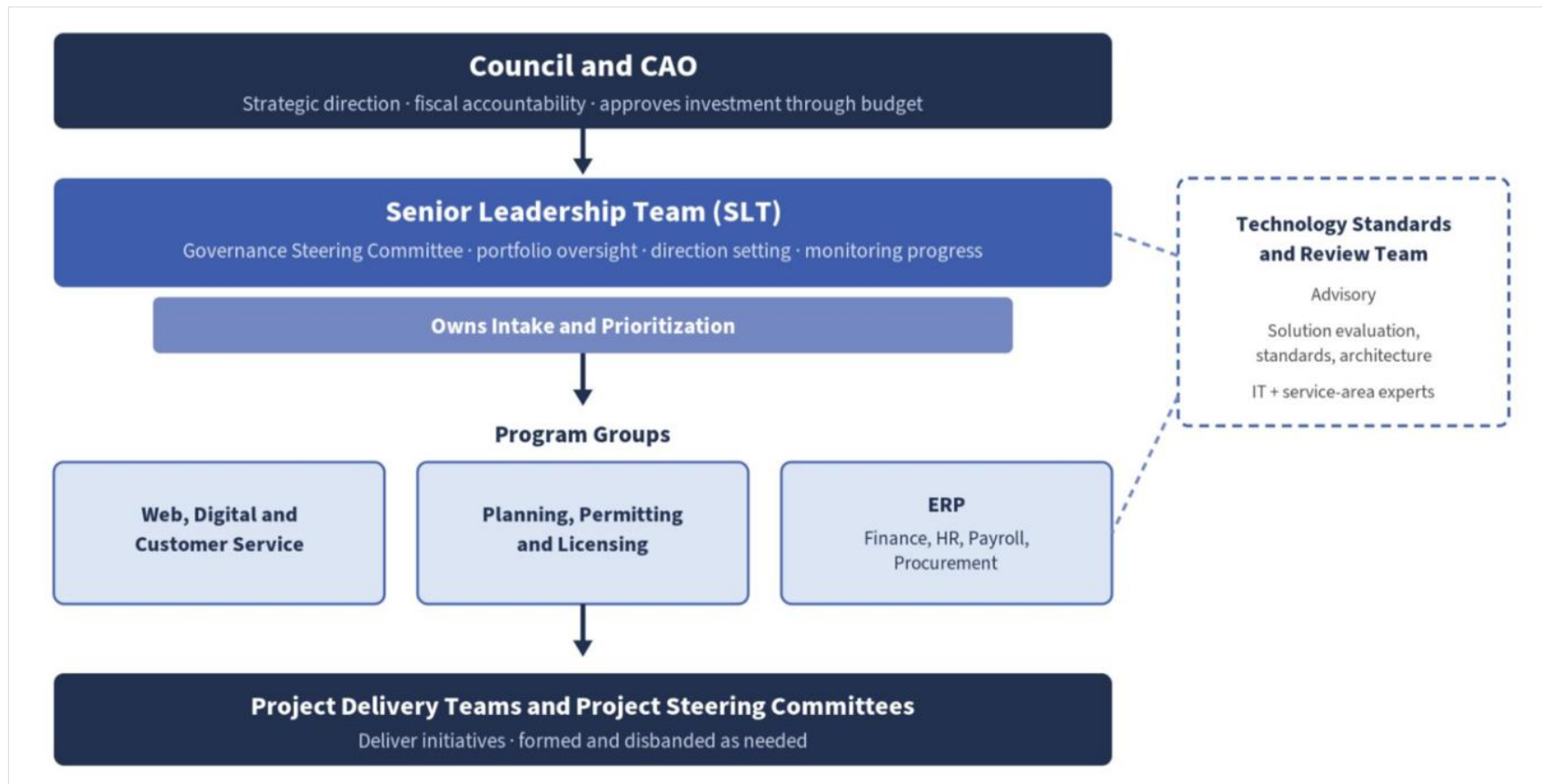


Figure 10 – Proposed governance model

The recommended governance identifies the bodies, mandates, and decision rights.

1. **Council and Chief Administrative Officer (CAO).** Strategic direction-setting, fiscal accountability, sets Council priorities, monitors Strategy implementation / progress. Approves investments through the annual budget process and receives strategic progress updates on implementation.
2. **Senior Leadership Team. SLT acts** as the **Governance Steering Committee** for Strategy implementation. Owns executive leadership of the customer service, digital, data and technology agenda, including portfolio delivery and oversight, prioritization, and direction setting. Monitors progress against strategic outcomes, resolves cross-departmental issues, confirms priorities, and ensures organizational capacity remains aligned with the approved roadmap. Formal terms of reference define mandate and responsibility. The Chief Financial Officer (CFO) with the IS Director will convene this group and manage agendas and decision making.
3. **Program Groups.** Director- and Manager-level groups convened for focused governance by key stakeholders of ongoing critical programs, meeting monthly or bi-monthly. Each will establish membership and a chair and have a defined term of reference. Where necessary (budget or resource impacts) these groups make recommendations, through their chair, to the Governance Steering Committee for guidance or approval. Three groups are recommended at launch:
 - a. Web/Digital/Customer Service Program (Communications, Customer Service, IS and Business Units)
 - b. Planning, Permitting and Licensing (Planning, Permitting, By-law, Fire, IS, Customer Service)
 - c. ERP (Finance, HR, Payroll, Procurement)
4. **Project Delivery Teams and Project Steering Committees.** Formed and disbanded as needed to deliver specific initiatives and report on status through portfolio reporting.
5. **Technology Standards and Review Team.** Advisory group, led by IS Director, focused on solution evaluation, technical standards and architecture, composed of technical and digital experts from Information Services and key service areas. Advises SLT and the Program Groups.

Each of these groups abide by and apply the guiding principles and standards throughout their work and decision-making processes.

Note that decision rights also scale with size. Small and medium-sized technology initiatives are delegated to the Director, Information Services, so the governance bodies are not overloaded with routine decisions. Larger or cross-departmental initiatives, and any material change to the approved workplan go to the Senior Leadership Team. The thresholds for what count as large are set when the governance process is documented and reviewed annually.

10.2 Intake and Prioritization

The governance model is intended to keep the City focused on the Strategy.

Although the Strategy identifies the major initiatives ahead, the City should expect new ideas, initiatives, and legislative changes to impact and divert attention from the delivery of the Strategy.

To mitigate this risk, the City will establish a process to ensure that before a new project can be approved (which diverts attention away from the strategic initiatives identified in the Strategy), the right level of due diligence has been applied and a conscious decision made. A project should move through multiple stages before being approved for scheduling and execution.

The three stages of review – **Idea, Concept, Project** – are described in the following sections.

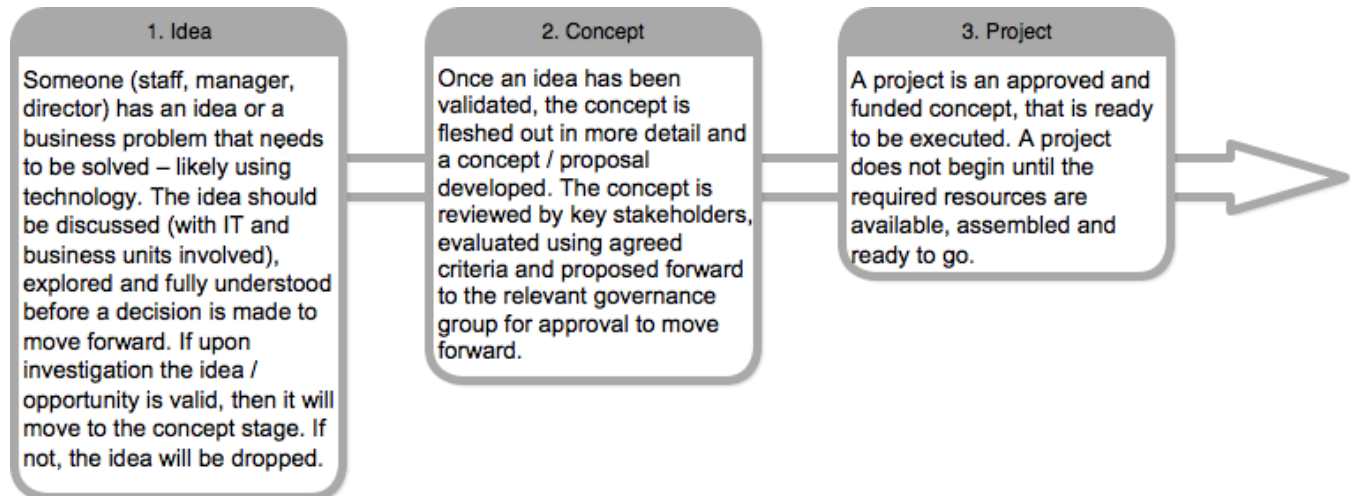


Figure 11: Idea – Concept – Project Process

The IS Director, working with partners will be responsible for maintaining a register of all ideas and concepts alongside the portfolio reporting shown later.

This information will be made available live to SLT members and staff.

The Idea Development Stage

The **Idea** part of the process is designed to ensure that project ideas are properly thought through before they become fully funded and committed projects.

It is intended to slow the idea process down to ensure an appropriate degree of exploration and development. During this stage, a team of IS, Communications, Customer Service, and Departmental staff will consider business needs, determine potential stakeholders, and consider options and implications of implementation.

The Concept Development Stage

If the **Idea** is deemed to be a valid opportunity to pursue, the team proceeds to the **Concept** stage where a more detailed project proposal is developed.

Further research about approaches, solutions, resource demands and funding needs is conducted. Once the research is complete and the idea is more completely understood, a project proposal is prepared.

Projects deemed to be large projects may require a business case and a resourcing plan to be prepared to accompany the project proposal. If appropriate, the relevant Program Group should review the project proposal.

It is important to note that, in the past, availability of resources (in Departments and in IS) has been the most significant impediment to the City's success in implementing initiatives. It is critical, therefore, to identify and secure the commitment of resources (department staff, IS staff, contract, secondment, and/or backfill), at the Director level before a concept becomes a project.

The team will work with the Project Sponsor to prepare an evaluation of the project proposal and rank it according to the ranking scheme agreed by SLT.

If funding is required as part of the annual capital project request process, all proposals will first need to be evaluated and ranked. The IS Director will also conduct a capacity management review (resource availability and/or needs) and make recommendations to SLT on the project's priority and the capacity of the City to deliver.

SLT will use this information to support its decisions about which proposals should go forward as part of the annual capital budget.

The Project Stage

Once a proposal has been approved (funded and resourced), a **Project** can be scheduled.

Note that approval and funding of a project does *not* mean that the project will begin immediately. The IS Director, working with SLT, sponsor and stakeholders, will schedule projects in consideration of resource availability, dependencies and other factors.

Balancing the Portfolio: Run, Grow, Transform

Just as one balances an investment portfolio, the City should seek to balance its digital and technology investment portfolio.

In the intake process, initiatives should be identified by the following categories:

- **Run** – *Keep the lights on.* Activities or investments required to keep existing City technology and business services running / operational. An example might be replacing an end-of-life network, server, storage or end-user computing equipment.

If IS budgets need to be trimmed, cuts should *not* come from Run initiatives.

- **Grow** – *Do more of what the City is already doing.* Activities or investments that provide for expansion of technology, additions to existing technology or service capabilities, or to accommodate growth of services. An example might be expanding PSD Citywide to be used for additional permit and licences.

Grow initiatives are usually not as mission critical as Run initiatives and often have some time flexibility, which makes them good candidates for starting early when funding is available or deferring when it's not.

- **Transform** – *Change how the City works.* Activities or investments that involve major changes that introduce new organizational capabilities or fundamental changes to business processes and service delivery. An example might be implementing Service North Bay or a new HRIS system.

When funding is limited, Transform initiatives are typically the first to be cut or deferred unless they are associated with key strategic initiatives. The City should, however, ensure that sufficient funds are allocated to the Transform category as these are the initiatives that will deliver high returns on investment and can significantly propel the organization forward.

This categorization is a useful guide for making key decisions around budget and project selection, and SLT with the IS Director's help should establish and monitor target allocations across these investment categories.

Resource Management

To determine the capacity for projects that depend heavily on digital and technology resources, the City needs to better understand its currently available resources (in IS and Departments) as well as the project effort required for each proposal so that it can select a realistic and achievable number of projects.

This progression from the *Idea* to *Project* proposal stage is designed to provide project teams with more time to develop a thorough understanding of the project resource needs so that the resource needs can be more accurately estimated and planned for prior to project start, rather than hoped for after.

IS will implement a resource management system to record allocated and planned staff time on project and operational work. The value of this data will grow over time.

The IS Team must ensure that this data is complete and consistent as it will be a key tool in matching resource capacity to the proposed project portfolio.

As part of the City's annual budgeting process, the IS Director will be responsible for collating the proposed IT project resource needs (Departmental and IS staff) and matching this to available capacity before budgets can be approved.

This information will also be made available to SLT to support the evaluation and scheduling of projects and the building of the annual IT capital project plan. It may necessitate changes to the portfolio or additional funding required to cover additional short-term contract staffing needs to deliver the portfolio.

10.3 Portfolio Management

The IS Director, working with the CFO, Customer Service Lead and with partners in Departments, will coordinate the reporting on the status of all portfolio projects (customer service, web, digital, business technology, technology infrastructure) in a way that provides visibility into the projects and provides SLT, the IS Team, sponsors, and stakeholders with information that can help them intervene when necessary to keep projects on track.

10.4 Architecture and Technical Standards

The City's technology environment is a complex, interconnected ecosystem. We refer to this as the City's technology architecture.

Architecture in this context refers to how the City's technology systems are designed to work together, how they interact and interoperate; it's the equivalent of the Official Plan, Zoning and Development Standards for the City's technology landscape.

The Technology Standards and Review Team, led by the IS Director, owns the architecture, technical standards, architectural decisions, and the City's approach to emerging technology.

The following architecture deliverables achieve this:

1. **Technical Standards.** As a quick win, publish a first set of corporate technical standards in Year 1. Apply them as evaluation criteria for new solutions and as stock requirements in every RFP.
2. **Solutions Architecture.** Target business solutions architecture – which identifies which solutions platforms are to be used for what purpose.
3. **Service Architecture.** The blueprint for how services are designed, delivered, and supported (including reusable patterns discussed earlier).
4. **Integration Architecture.** The blueprint for how the City's systems connect to each other, share data, and present a single picture of the customer.

"Reuse before buying, buy before building" is operationalized as a sourcing tactic for technology decisions. The Technical Review Team is responsible for applying this.

The team also maintains lifecycle plans for the City's core platforms and infrastructure and uses them to identify non-discretionary work: the renewals, upgrades and security measures required to keep services running safely. This work is flagged in the intake and prioritization process as must-do, ahead of discretionary projects.

10.5 Communities of Practice

Though not formally part of the decision-making governance model, Communities of Practice bring together staff working on common areas to share learning, identify shared challenges, and build organizational knowledge.

The Strategy launches with one named Community of Practice which the City can extend as opportunities emerge: Data and GIS Community of Practice as a forum for data governance decisions, GIS expansion, and integration questions.

Additional Communities of Practice may be established around customer service, service design, and project delivery as the workforce advances, builds confidence and has more to share.

10.6 Measurement and Reporting

Governance reporting runs as follows:

1. **Real time.** Visibility for all staff – project portfolio is made available on the intranet.
2. **Monthly.** Working level reporting to the Governance Steering Committee and program groups on items in flight and immediate issues and exceptions.

3. **Quarterly.** Portfolio review by the Governance Steering Committee. Strategic direction reaffirmed, exceptions resolved, sequencing adjusted.
4. **Annual.** Strategy refresh and review by the SLT. Confirms priorities, refreshes the roadmap, updates cost assumptions, and informs budget and resourcing.
5. **Periodic.** Updates provided to Council as appropriate on Strategy progress and milestones.

11.0 Delivery Capability and Capacity

The Delivery Capability and Capacity workstream focuses on the workforce side of the Strategy and how the City will resource the delivery of the Strategy.

This chapter covers the staffing model behind Service North Bay, the resources and operating practices that support the delivery of the workstreams, the related training, and necessary change management the City needs to deliver on what the rest of this report sets out.

11.1 The Staff Capacity Problem

One of the most significant barriers to successful transformation at the City is capacity. Staff are largely focused on operating and supporting day-to-day municipal services, leaving limited time to dedicate to strategic initiatives and improvement projects.

Meaningful change requires dedicated resources. Priority projects should be supported by staff who are formally assigned to the work and, where necessary, backfilled in their operational roles. Without this level of commitment, projects are more likely to be delayed, exceed budgets, and fall short of their objectives.

Creating dedicated capacity for transformation will be a key success factor in delivering this Strategy.

This is addressed in this Strategy in two primary ways:

11.1.1 Organizational Changes

The Strategy requires organizational change on three fronts: the customer-facing front-line in Service North Bay, the Web Team in Communications, and in Information Services.

Each depends on clear roles and responsibilities and on adding capacity and capability where the City is stretched today.

1. **Service North Bay.** Team of Customer Service professionals, supported by specialist capacity for web content in Communications and application support in Information Services. Capacity and resourcing requirements will be assessed as Service North Bay evolves through the phased implementation approach.
2. **Web Team.** The City needs additional capacity and capability to manage improved web content to support the transition to self-service.

3. **Information Services.** Information Services should be realigned to match the demands of the Strategy, moving from a structure centered on day-to-day operations to one organized around core services and clear areas of accountability: infrastructure and support, business solutions and data, and digital and project delivery.

Detailed workforce planning, capacity assessment, and organizational design activities will be completed during implementation.

11.1.2 New Resourcing Strategies

Additionally, the City must use a mix of resourcing tactics to deliver the Strategy, all of which are intended to add additional capacity:

1. Internal hires for ongoing operational roles and corporate functions.
2. Capital-funded contract positions for time-bound implementation work.
3. Vendor of record arrangements for on-demand specialist capacity.
4. Out-tasking where the City has a clear need and an external partner can deliver more efficiently than in-house.

The key opportunity for the City is the second item in the list - bundling funding for contract staffing into projects is a common municipal practice that is leading to improved project outcomes. The City must take the opportunity, where appropriate, to capitalize all costs associated with delivering a project, just as it might when building a facility, or replacing a water main.

An annual resource capacity plan, developed as part of the annual project portfolio review, will identify where internal capacity is constrained and which mix of resourcing is needed for the upcoming roadmap year.

11.1.3 Ongoing Workforce Planning

The effective delivery of the Strategy depends on the right resources being available to deliver the committed projects.

Through the governance and budgeting cycle, the City must annually recalibrate what can be achieved in the Strategy with the resourcing available. Where supplemental resourcing may be required, the CFO, IS Director and Governance Steering Committee will determine whether this is to be through capital-funded contract positions, vendor of record arrangements and strategic partnerships, or whether additional full-time staffing is required.

11.2 Project Delivery

The City needs to improve how it delivers technology, digital and service transformation projects. Several factors are critical to project success, including:

- Strong project sponsorship and leadership commitment.
- Clear vision.
- A strong Project Manager.
- Sufficient resources dedicated to the project – subject matter, business analysis and technical expertise.
- An empowered project team that can make decisions / drive change.
- A focus on business processes and outcomes over technology implementation.
- A clear change management plan to ensure successful adoption.

Best practices recommend applying a proven project management methodology.

The IS Director is responsible for defining a consistent best practice methodology, with associated processes, tools and artifacts that can be used to improve project delivery consistency and performance in the technology, digital and Customer Service realm.

The Project Management Institute (PMI) PM Body of Knowledge (PMBOK) provides best practices that the City can adopt for its major projects. This methodology, shown below, defines standard project phases, documentation requirements and checkpoints at the end of each stage to ensure the project is progressing satisfactorily.



Figure 12: Sample project management methodology based on PMI best practices

The IS Director will seek approval and endorsement of the methodology through the Governance Steering Committee. SLT members are accountable for ensuring that all technology or digitally enabled projects in their Departments follow the methodology and report regularly through the portfolio management process.

11.3 Change Management

With this Strategy the City is seeking to move from a traditional way of operating to a more modern, digital mode of operating.

Change can naturally create some uncertainty for staff and teams, and they will need reassurance and active support to move to the new mode of operating.

ADKAR by Prosci is a change management methodology that lays out how to land change successfully. ADKAR is an acronym that identifies the following stages of change:

- **Awareness:** People know about and understand why the change is happening and what's driving it.
- **Desire:** People are personally motivated to support and participate in the change.
- **Knowledge:** People know how to change – the new processes, tools, and behaviours required.
- **Ability:** People can actually apply that knowledge and perform at the required level.
- **Reinforcement:** The change is sustained through recognition, measurement, and follow-through so people don't revert to old habits.

The Strategy directs the City to adopt and incorporate this change management model into its toolkit, into the delivery of this Strategy and into each project introducing service changes moving forward.

11.4 Change Readiness

The Change Readiness Assessment suggests that the City will be somewhat resistant to change. Thus, applying the change management principles above will be critical to success. The Change Management Plan suggests various change tactics:

- **Clear Leadership Commitment.** Demonstrable leadership from SLT and management on the criticality and importance of the cultural shift.
- **Clear and Regular Communication.** Two-way communication with staff through the rollout, on a predictable schedule. The Communications team runs change communications, with service owners involved throughout.

- **Governance and Sequencing.** Logical sequencing and metering of change activities to ensure that the volume of change is not overwhelming to staff.
- **Training.** Every change comes with the required training, so staff have the tools and knowledge they need to move into new ways of working.
- **Measurable Outcomes.** Each initiative has clear criteria that must be met before it is declared a success.

Change resistance and change fatigue are clear risks in the Strategy. The phased rollout, the named owners, and the change management discipline described above are the City's response to mitigate.

11.5 Training

Training is a key aspect of change management, and thus a consistent training capability supports the Strategy, built in three layers:

1. **Structured Customer Service training** and onboarding aligned to the eight Customer Service Principles. Delivered to every staff member who deals with customers, regardless of role.
2. **A corporate Digital Education Program.** A digital literacy curriculum covering the tools, the design methodology, and the practices the City is adopting.
3. **Ongoing technology training commitments.** Introducing ongoing training for staff to support mastery of available technologies – including M365, AI and various business solutions.

The City should establish a corporate learning and development catalogue that includes technology, digital, and customer service training programs. The IS Director and the HR Director should collaborate to develop a structured technology and digital literacy curriculum aimed at improving digital awareness, skills, and confidence across the organization.

In addition, the Customer Service Lead should work with the HR Director to develop and deliver a customer service training program that promotes consistent service standards, customer-centric practices, and a shared understanding of the desired customer experience across the City.

Together, these initiatives will help build the organizational capabilities required to support digital transformation, service excellence, and continuous improvement.

12.0 Roadmap and Implementation

This chapter sets out how the Strategy is delivered.

The roadmap represents the desired sequencing of initiatives; annual governance reviews may defer, accelerate, or re-sequence initiatives based on available capacity, funding, and organizational readiness.

This chapter provides a summary of the implementation plan. The detailed, initiative-level implementation plan, with timing by year, dependencies, sizing and cost estimates is provided in [Appendix A](#).

12.1 Sequencing

The roadmap is sequenced with five considerations in mind:

1. **Foundational work first.** Governance and other foundations must be in place before the workstreams that depend on them can scale.
2. **Visible early wins.** A small number of first-wave priorities prove the ideas and model and build confidence.
3. **Capacity constraints.** The City has limited delivery capacity, and the roadmap respects that constraint.
4. **Prior commitments.** Work already on the City's existing workplan continues in an integrated fashion.
5. **Customer impact.** Where customer impact is highest, the sequencing accelerates.

The timeline that follows sets this out year by year for each workstream.

12.2 How the Plan Unfolds

The Strategy is delivered over multiple years, sequenced so that foundations come first and capability builds over time:

Year	Activities
Year 1	• Stand up governance and confirm resourcing • Design Service North Bay • Complete website procurement/selection • Launch recreation and facility booking platform • Implement Citywide Service Request module • Continue cybersecurity strengthening
Year 2	• Replace the telephony platform

Year	Activities
	• Launch Service North Bay and new website • First priority services online: service requests, tax, parking • Begin business-systems modernization (NaviLine and HRIS) • Stand up the integration platform and single sign-on
Year 3	• Extend Service North Bay to higher-volume departments (Public Works, Transit, Waste Management) • Next set of priority services moved online • Complete HRIS, records and asset management modernization • After-hours service option introduced • CRM fully operational across Service North Bay
Year 4	• Finance system review and decision point • Complete integration platform and single sign-on rollout • Stand up the Voice of the Customer function • Embed the model across departments • Core services available digitally
Year 5+	• Extend Service North Bay to remaining services (Water and Wastewater, satellite counters) • Full CRM in operation • Ongoing portfolio reviews and annual strategy refresh to Council • Continuous service improvement as standard practice • One City, One Customer fully realized • Establish next 5-year plan

12.3 Building Initial Momentum

A small number of first-wave projects in the early stage of the Strategy are designed to help prove the new operating model in visible, achievable ways. First-wave demonstrators include:

Website replacement.

This is the largest and most impactful change that is visible to every customer who uses the website with the following intended outcomes:

- Improved customer satisfaction with the municipal website.

- Increased use of online self-service, reducing the need to call or visit the municipality.
- Easier access to information through improved navigation, search and content.
- A modern, accessible and mobile-friendly digital experience for all users.
- Clear departmental ownership and governance of website content.

Service North Bay Phase 1 launch

This is the flagship demonstrator project that proves the consolidated contact centre model supported by the right technology can resolve most inquiries at the first point of contact. The intended outcomes are:

- More customer inquiries resolved at the first point of contact.
- Reduced transfers between departments and fewer repeat contacts.
- Faster, more consistent customer service regardless of contact channel.
- Improved customer satisfaction with municipal service delivery.
- A proven operating model for expanding Service North Bay over time.

PSD Citywide CRM and Customer Portal activation.

This is the key component that underpins Service North Bay and the foundation for launching service request tracking and online service request capability. The intended outcomes here are:

- A single, consistent platform for managing customer requests across participating services.
- Customers able to submit, track and receive updates on service requests online.
- Improved visibility of customer demand, service performance and workload.
- Reduced manual processes, spreadsheets and email-based tracking.
- A scalable digital foundation for future service transformation initiatives.

First priority services moved end-to-end online.

Including burn permits, recreation booking, and various others selected from the priority list. The expected outcomes are:

- Priority municipal services can be completed entirely online from application through completion.
- Increased adoption of digital service channels by residents and businesses.

- Faster processing times and reduced administrative effort.
- Improved customer experience through simpler, more intuitive service journeys.
- A repeatable approach for digitizing additional municipal services in future phases.

12.4 Implementation Timeline by Workstream

The implementation timeline recommended for each workstream is set out below, with active years marked for each initiative. Items already on the City's existing workplan continue alongside the new commitments.

Years are shown relative to approval, with Year 1 beginning when Council approves the Strategy (targeted for August 2026).

Governance

Governance is the work that sets the City up to make consistent decisions about services, technology and digital investments. Most governance work lands in the first two years because everything else depends on it, with ongoing portfolio review and annual Strategy refresh running through the planning horizon.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Adopt governance model; establish SLT as Governance Steering Committee	X					
Stand up Program Groups	X					
Stand up Technical Standards and Review Team	X					
Stand up Data and GIS Community of Practice	X					
Implement intake/prioritization process	X	X				
Develop policy framework (AI, data, records, cyber, cloud)	X	X	X			
Annual Strategy refresh and ongoing Council updates	X	X	X	X	X	X
Quarterly portfolio review by SLT	X	X	X	X	X	X
Develop and publish corporate technology standards	X	X	X	X	X	X
Develop architecture blueprints		X	X	X	X	
Document decision-right thresholds	X					
Establish additional Communities of Practice		X	X	X	X	
Establish Benefits Register	X	X	X	X	X	X

Customer Forward

Customer Forward is the operational name for the Customer Service Strategy, delivered through Service North Bay. It begins with design, assessment and resourcing, moves to the launch of the first phase of Service North Bay, and then expands through later phases across the rest of the planning horizon.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Service North Bay Phase 1 design	X					
PSD Citywide CRM implementation and configuration	X	X				
Determine staffing for Phases 2 and 3			X	X	X	
City Hall reconfiguration (design + build)		X				
Service Level Agreements for Phase 1 services	X	X				
Knowledge base build for frontline staff	X	X	X	X	X	
After-hours service vendor procurement		X				
Service North Bay Phase 1 launch		X				
Service North Bay Phase 2 launch			X			
Voice of the Customer function stand-up				X	X	
Service North Bay Future Phases (Water/Wastewater, satellite facilities)					X	
Customer service dashboard build and launch	X	X	X			
Publish Promise, Service Commitments, standards and targets	X					
Complete the NBSL		X	X			
Customer research, personas and Target Customer Experience			X	X	X	
Back-office system access for Customer Service Associates	X	X				

Digital Solutions

Digital Solutions covers the modernization of the website, introduction of new online services, forms, payments and the digital service patterns underneath them. Several items are already on the City's existing workplan (web stabilization, CMS procurement and implementation). New commitments concentrate in Year 2 with the website launch and the first priority service journeys, then continue into Year 3 as the priority digital service offerings expand.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Stabilize website with security patches	X					
Website CMS procurement close-out	X					
Website CMS implementation and launch	X	X				

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Fire, EDD and other microsites migrated to main City site	X	X				
Information architecture redesign	X	X				
Content rewrite to Grade 6 reading level	X	X	X			
Priority new digital services (Wave 1)		X				
Priority new digital services (Wave 2)			X			
Priority new digital services (subsequent waves)				X	X	
Forms migration to new platform		X	X			
Corporate payment modernization		X	X			
AI Roadmap		X	X			
Public engagement platform investigation (and potential implementation)		X				
Digital service promotion		X	X	X	X	X
Develop the reusable service pattern library			X	X		
Establish the joint web operating model	X	X				
Standardized uptake and digital satisfaction measurement tool	X	X				

Business Solutions

This covers the corporate systems behind the customer experience. The ERP aspects are front and centre – with HRIS procurement, NaviLine enhancements and the launch of the Tax portal. Facility Booking/Recreation Registration, and Records Management modernization are already on the City's existing workplan and continue – with new focus on PSD Citywide expansion and Asset and Work Management system rationalization.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
HRIS assessment and detailed implementation plan	X					
HRIS procurement		X				
HRIS implementation		X	X			
Xplor Recreation - Facility Booking modernization	X	X				
Xplor Recreation - Program Registration software		X	X			
Xplor Recreation - Marina management solution		X				
NaviLine modernization / improvements	X	X	X			
Tax portal implementation			X	X		
Finance system / ERP strategy review				X		
Work and Asset Management review		X	X			

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Work and Asset Management systems rationalization implementation				X	X	
Public safety NG911 / CAD upgrades		X	X			
Fire RMS modernization (CriSys)		X	X			
Transit modernization roadmap		X				
Transit systems modernizations			X	X	X	
PSD Citywide platform expansion		X	X	X	X	
Microsoft 365 assessment and adoption roadmap	X	X				
Corporate document management approach			X	X		
Records management system implementation				X	X	
Copilot deployment	X					
GIS-led service opportunities roadmap	X	X	X	X	X	

Foundational Technology

Foundational Technology delivers the capabilities that staff working in offices and in the field, as well as the customer-facing and business solution workstreams depend on. Telephony replacement lands early to support Service North Bay Phase 1. The integration platform runs across Year 2 to Year 4. Cybersecurity strengthening and ongoing platform modernization are ongoing throughout.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Telephony platform replacement	X	X				
Integration platform stand-up		X	X			
Single Sign-On implementation		X	X	X	X	
Cybersecurity strategy and strengthening	X	X	X	X	X	X
Ongoing infrastructure platform modernization	X	X	X	X	X	X
Disaster recovery plan			X			

Delivery Capability and Capacity

This covers the people, training and operating models that make the rest of the Strategy work. The training curriculum and ITSM modernization in IS run across Year 1 and Year 2 to support Service North Bay Phase 1 launch. Formalization of methodologies is the focus in Year 2, and workforce planning and change management are ongoing throughout – using capital funding to add capacity where needed.

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Customer Service training curriculum	X	X				

Initiative	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Digital Education Program		X				
ITSM discipline stand-up	X	X	X			
Workforce planning annual cycle, including capital funding resources to support program delivery	X	X	X	X	X	
Change management plan and rollout	X	X	X			
Project management methodology and training		X				
Change management methodology and training		X				
Information Services realignment	X	X				
Web team capacity increase	X					
Establish supplemental resourcing mechanisms		X	X	X	X	
Ongoing technology training program		X	X	X	X	

12.5 Critical Path and Key Dependencies

A small number of dependencies are key to moving forward:

Governance comes first. The governance model and intake/prioritization processes come first, because every other initiative is sequenced through them and there is no reliable way to make decisions until they are in place.

Resourcing is critical. Service North Bay, Web and IS resourcing are fundamental to the City's ability to advance the Strategy.

Change management is key. Awareness, desire, buy-in, and leadership support for the strategic directions, and the changes that will come as a result will be critical to advance. Executing the change management plan will be key to achieving the required support and buy-in from staff and management.

The new website platform sets the pace for digital service work. The move to the new content management system comes before the information architecture redesign, the priority service journeys, and the forms migration, so the platform launch sets the timing for the other customer-facing digital work.

The CRM. CRM is foundational for underpinning Service North Bay and launching online service requests. Implementation must complete before Service North Bay can scale.

Service North Bay launch is a tipping point. The Phase 1 launch depends on the service design, resourcing, the service standards and knowledge base, all of which must land before launch.

12.6 Keeping the Strategy Current

Although the Strategy is written down, and of course you are reading it right now, this Strategy is not a static document.

Customer expectations, technology capabilities, cybersecurity risks, funding conditions, vendor markets, legislative requirements, and corporate priorities will change over the planning horizon. The City will need a disciplined process to keep the Strategy current while maintaining focus on the overall direction.

The Strategy should be reviewed annually by SLT through the governance cycle. At a minimum, the annual review should confirm priorities, refresh sequencing, update cost assumptions, and identify emerging risks and opportunities.

The intent is not to reopen the Strategy each year. Rather, it should be managed as a living portfolio, with deliberate and transparent decisions about what is being added, deferred, accelerated, replaced, or re-sequenced.

Keeping the Strategy current also depends on strong measurement, which is discussed in the next chapter.

13.0 Outcomes and Measurement

The Strategy is measured by what residents, businesses, and visitors experience and by whether the City is delivering its commitments. This chapter describes the strategic outcomes, the measurement framework that supports them, the targets that govern day-to-day service, and how the City closes the loop from measurement back to improvement.

13.1 What Customers Will See

The customer-facing improvements residents, businesses and visitors will see over the Strategy's timeline:

Within 2 years	Within 4 years	Year 5 and Beyond
• One front door, phone number, email, website • Submit and track a service request online • Access tax bill / account history online • Book a city facility online with payment • Apply and pay for a burn permit online • Renew a business license online • Receive proactive updates on requests	• Single sign-on for multiple City services • Services on website in plain language (Grade 6 level) • Subscribe to service notifications • Real-time service status (snow clearance, road closures, parking) on website and navigation apps • Be remembered between interactions • Register for recreation programs online • Book accessible transit trips online	• Access service at satellite locations (recreation centre, arenas) • Resolve most inquiries on first contact • One City, One Customer across every department and service • See City act on feedback through service improvements

13.2 Outcomes and KPIs

Measurement runs at several levels:

1. **Customer-facing service outcomes.** Whether services are easier to access, complete, and resolve.
2. **Digital service outcomes.** Online service adoption and satisfaction.

3. **Operating model outcomes.** Whether governance discipline, service ownership, training, and adoption are on track.
4. **Roadmap delivery outcomes.** Whether the items in the implementation plan are landing on time, on budget, and delivering the value they promised.

A consistent set of corporate and departmental key performance indicators (KPIs) supports each level. Service owners own the KPIs for their services, with Service North Bay responsible for collating and reporting to SLT. SLT reviews the corporate-level KPIs quarterly through the governance cadence.

13.2.1 Customer Service Performance Targets

The headline customer service performance targets are anchored at first contact and at the contact centre:

1. **First-contact Resolution (FCR):** 80 percent. Share of customer requests resolved at first contact (without escalation or follow-up) for inquiries within scope.
2. **Service Level (80/30):** 80 percent of calls answered within 30 seconds at the Service North Bay main number. The 80/30 standard is the industry benchmark for contact centre responsiveness.
3. **Abandonment Rate:** below 10 percent. Share of customers who disconnect before reaching a service associate.
4. **Response Standards by Channel.** Defined turnaround times for email, voicemail and written inquiries, with proactive updates to the customer when the standard cannot be met.
5. **Plain-language Standard:** Grade 6 reading level. Applies across the website, scripts and customer-facing materials.

The targets apply once Service North Bay Phase 1 is operating with the necessary technology, training and staffing in place. Targets are reviewed annually through the governance cycle and adjusted as Service North Bay matures.

A light customer service dashboard launches early in Service North Bay Phase 1, covering three operational measures: volume (calls received, emails received, counter visits, online transactions), repeat contact (customers contacting the City more than once for the same issue), and response times across channels against the standards.

The dashboard should be visible to leadership and to the teams doing the work. The intention is operational visibility for improvement, not just executive reporting.

13.2.2 Digital Measures

Digital Adoption

The corporate digital adoption target is 80 percent for all new digital services. The target is supported by active promotion to reach that level rather than assumed as customer behaviour.

Adoption is tracked as the ratio of digital transactions to total transactions for each service. The 80 percent target is drawn from comparator municipalities and realistic for North Bay's service mix.

Satisfaction with Digital Services

It is recommended that a single, consistent satisfaction signal is collected from every digital service the City offers. The approach is modelled on the UK Government Digital Service standard: a simple rating (typically a 1-to-5 star scale or a thumbs up/down) plus an optional open feedback box at the end of each digital transaction.

Service North Bay Sign in

[Home](#) · [Business licences](#)

Give feedback on Register for a business licence

Satisfaction survey

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

☐ Very satisfied
☐ Satisfied
☐ Neither satisfied nor dissatisfied
☐ Dissatisfied
☐ Very dissatisfied

How could we improve this service?

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

You have 1200 characters remaining

[Send feedback](#)

Service North Bay · 705-474-0400 · northbay.ca/service

Call. Click. Come in.

Figure 23: Sample common digital service satisfaction measurement

This serves three purposes: it monitors which services perform well and which need attention, it surfaces patterns in feedback that point to common improvement opportunities, and it tracks satisfaction over time as services improve.

Results feed the customer service dashboard and the service-level improvement cycles.

13.2.3 Operating and Roadmap Delivery

The CFO and IS Director are responsible for reporting quarterly to SLT on progress against the roadmap and the activities laid out in this Strategy.

Are we actually doing what we said?

96 activities, four pillars, every one with an owner and a date. Updated monthly, reported to SLT quarterly and Council annually.

34 / 96

activities complete

78%

on schedule

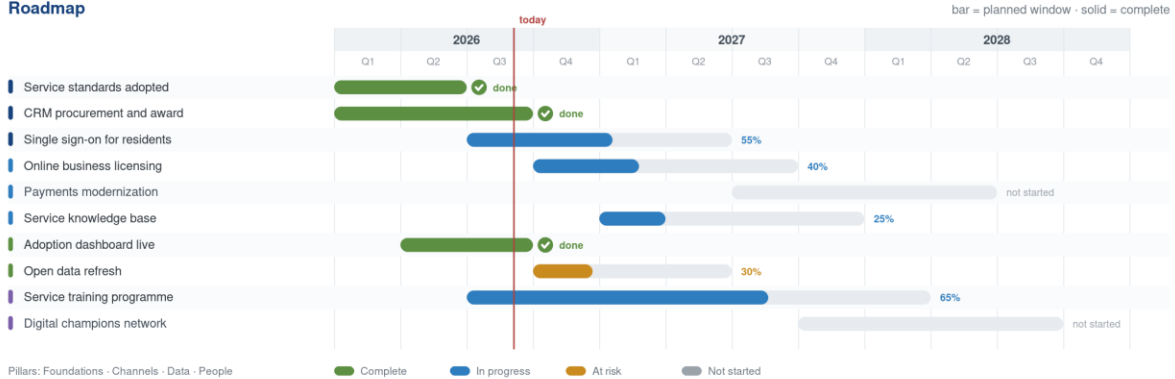
6

at risk or slipped

12

due this quarter

Roadmap



Progress by pillar



Needs a decision this quarter

- Open data refresh 6 weeks behind · owner: IT · now Q1 2027
- Payments modernization start held pending 2027 budget approval
- Service knowledge base content owners named in 3 of 7 departments

Nothing moves to done without evidence: a live service, a published standard, or a number on the dashboard.

northbay.ca/service

Figure 34: Sample quarterly report

14.0 Benefits, Investment and Risks

This chapter sets out the value for the City in pursuing this Strategy: what the City expects to gain, what the investment looks like over time, what conditions need to hold for delivery to succeed, and what could go wrong.

14.1 Anticipated Benefits and Efficiencies

The Strategy generates three categories of benefit:

1. **Cashable savings.** These are cash-releasing savings – they reduce the level of resource needed to deliver a given outcome, producing money that can actually be taken out of the budget and redeployed elsewhere. Because the cash is freed up, it can be handed back or reallocated, resulting in a direct, measurable reduction in spend.
2. **Non-cashable savings.** These improve outcomes or productivity for the same level of resource – the organization keeps its money but does more with it, rather than spending less to maintain existing output. The gains are real (more capacity, better service, reclaimed staff time) but they don't release cash that can be removed from the budget.
3. **Wider economic and societal benefits.** These flow beyond the City to residents, businesses and the broader community. Online self-service returns time to residents and reduces unnecessary trips to City Hall, service becomes more equitable for those with limited mobility or non-standard hours, and the City's stronger digital standing supports investor confidence and local economic development.

In practice the benefits derived from the investments outlined in this Strategy are primarily around achieving non-cashable savings and broader societal impacts. While some cashable savings may be achieved through software rationalization – those gains will need to be reallocated to gaps where new software is needed.

The efficiencies identified are about increasing capacity, not cutting resources. The operating efficiencies and recovered staff time are reinvested, not removed. Time that staff currently lose to manual workarounds, working across disconnected systems, and chasing information is redirected to higher-value work: resolving customer issues at first contact, improving services, and taking on the volume of new and rising demand the City already faces with the same team.

In an environment where municipalities are being asked to do more with constrained resources and where skilled staff are difficult to recruit and retain, the goal is to make the City's existing workforce more effective and less burdened, not smaller. The dollar figures represent cost avoidance and productivity gained against a growing workload,

allowing the City to absorb future demand without proportional increases in cost, rather than money taken out of the budget.

14.2 Budget Impacts

Overall, the workplan estimates suggest a potential capital investment over five years of approximately \$5M, with a \$1.5M operating impact by year five. Readers are reminded that this Strategy covers several large programs – customer service, web, digital services, as well as the technology portfolio.

Several items in the Strategy are already on the City's existing workplan and continue under the budget process already in place. The City has approved \$500,000 for 2026 and requested an additional \$500,000 in 2027 to support the implementation of the Strategy. Approximately \$5.7M in previously approved funding is available to support the ERP implementation and an additional \$1M was requested to be added in 2027. Not all the funding required for the delivery is net new.

Investment requirements will be finalized by the City, and any additional funding items will come forward as part of the standard capital and operating budget cycles, sequenced against the roadmap.

Capital and operating costs will shift over the duration of the Strategy. Upfront investments are capital-heavy, with platforms, infrastructure and design work in the first 2-3 years. Subsequent years become operating-heavy, as software subscriptions kick in, reflecting the more mature state of the new service model and the ongoing improvement work.

14.3 Risks and Conditions for Success

Risks

A Strategy of this nature faces four primary risks which the City must actively mitigate.

1. Limited delivery capacity. Funding and capacity are not the same constraint. The City can approve the investment and still be unable to deliver because the same small group of people need to work on every initiative while continuing to carry their operational responsibilities. This is the most likely cause of delays, and it tends to appear well after approval, and the program is already committed.

Mitigation: The resourcing strategies presented in the Strategy combine internal capacity, targeted hiring, and external delivery support, and the intake and prioritization process ensures new work is assessed against available capacity rather than added on top of it.

2. Insufficient investment. The Strategy depends on sustained funding across multiple budget cycles. The risk is that the Strategy and investment is approved in principle but deferred in practice, with individual items falling out of the capital and operating budgets year over year until the sequencing no longer works and dependencies begin to break.

Mitigation: The roadmap identifies which items are already on the existing workplan and which require new funding. The quarterly portfolio review gives SLT a standing mechanism to confirm that budget submissions still reflect the appropriate sequencing and priorities.

3. Loss of focus and competing priorities. Any program spanning several years will compete with emergent operational issues, new Council priorities, and the annual budget cycle. The risk is that the Strategy will be quietly displaced, one item at a time, until the roadmap no longer reflects what the organization is actually doing. The election in October 2026 adds to this, with a potential for changing priorities.

Mitigation: The reporting cadence established by the Strategy ensures that the program and Strategy continue to be visible, which makes displacement or deferment a deliberate decision rather than an unintended consequence.

4. Treating the Strategy as a technology project. The most common way municipal transformation programs fail is not because of technology - it is because accountability lands with Information Services and departments position themselves as recipients rather than partners and owners in the transformation. Service North Bay is exposed to this risk because the consolidated contact centre concept only delivers real value if departments genuinely transfer work to them and change how they operate behind it.

Mitigation: Service owners in the departments hold accountability for outcomes and benefits, and the measurement framework makes service performance and customer experience visible rather than just implementation milestones.

Conditions for Success

Notwithstanding the risks identified above, the following keys to success have been identified with other municipal transformation programs and will be important for North Bay.

It is worth noting that the keys to success are all people related – and this is an important insight. Success around transformation is not about buying the right technology – it's about leading complex, inter-connected organizational change.

- 1. Council Leadership.** Council keeps the City focused on delivering the Strategy and protecting from distractions. Provides strong support, budget and resourcing. Creates space for the implementation of the Strategy, and the necessary foundations.

2. **Organizational Leadership.** Visible leadership from the top. Senior leaders publicly back the direction. Sustained attention and focus are what separates strategies that deliver from those that gather dust.
3. **Funding and Capacity.** Capital and operating budgets are aligned to the roadmap. Contract staffing or vendor of record capacity is available where internal capacity is constrained.
4. **Governance Discipline.** SLT keeps strategy the focus. The portfolio is monitored. The intake and prioritization process is followed. Exceptions are managed transparently – not quietly deferred.
5. **Shared Business and IT Accountability.** Technology and digital improvements are no longer IT projects. They are business led service improvement projects with technology as the enabler. Both sides own the outcome.
6. **Product Management Model.** Platforms are owned for their full lifecycle; they progressively evolve and are enhanced not frozen after the project closes. Named product owners are accountable for ongoing evolution.

All of this is underpinned by strong change management discipline that helps City staff seamlessly adapt to new ways of working and new ways of thinking about service design and delivery.

The Strategy can only deliver its intended outcomes if the supporting conditions can be established and maintained.

15.0 Conclusion

The City of North Bay finds itself at a moment where service expectations have moved faster than the City has been able to respond to. The Strategy set out in this report is the City's response to close the gap and meet the community's expectations.

15.1 Summary of Recommendations

The Strategy carries seven recommendations detailed across the chapters of this report:

1. **Adopt the recommended governance model to guide modernization and integrated Strategy implementation.** Council sets strategic direction through the endorsement of the strategy. The Senior Leadership Team is established as the Governance Steering Committee, with supporting Program Groups, and an intake, prioritization, and portfolio delivery process.
2. **Adopt the goals, vision and guiding principles** as the basis for all future digital, technology and customer service decision making in the future.
3. **Establish Service North Bay.** Endorse and commit to the consolidated front-door model at City Hall, and the phased rollout of Service North Bay, with Phase 1 launching with customer support for Finance, Parking, By-law Inquiries and Enforcement, and Parks, Arts, Culture and Recreation, and general inquiries and payments, with subsequent expansion to other department services and the longer term introduction of satellite Service North Bay locations in Community Centres and other City facilities.
4. **Implement core technologies to support the stand-up and operation of Service North Bay,** including:
 - a. **Implement a CRM.** Implement PSD Citywide as the near-term foundation for CRM.
 - b. **Modernize the telephony platform** to support Service North Bay's contact centre functions (call tree management, call-back, reporting).
 - c. **Modernize the website through** a new hosted CMS, a redesigned information architecture, plain-language content and full digital lifecycles for priority services.
 - d. **Modernize corporate payments** to support transactional services moving online.

- e. **Implement new digital services for high-volume transactions**, including request a service/report a problem, tax portal, recreation, facility and park rentals, bookings, payments, improved parking, permitting and licensing services.
5. **Implement / update foundational** technologies to modernize back-office processes and establish robust, secure and scalable technology infrastructure, including:
 - a. **Implement an updated ERP Strategy** with interim NaviLine modernization and cloud migration, tax portal implementation, and investment in a new HRIS system.
 - b. **Fully implement Xplor Recreation** - including facility rentals, and program booking.
 - c. Standardize and fully deploy **Work and Asset Management systems**.
 - d. Implement **Document and Records Management**, including M365 expansion / adoption.
 - e. Continued **GIS services expansion**.
 - f. Mobilize an **Infrastructure modernization program**.
 - g. Continued **Cybersecurity and resilience** investment.
 6. **Invest in critical resourcing and delivery capability and capacity**. Put in place the roles, resourcing and organizational structure needed to deliver and sustain the Strategy, across Service North Bay, Information Services and business units to support project work.
 7. **Commit to measuring and reporting** outcomes against the Strategy, customer service targets and digital adoption goals to SLT, and to Council on a regular basis.

15.2 Immediate Next Steps

The six-month action list for the initial phase of work:

1. **Council receives and endorses the Strategy** so it can be used as a guiding framework to support municipal decision-making, priority-setting, service delivery, long-term planning and inform the development of future municipal operating and capital budgets to improve the delivery of municipal services to the community.
2. **Senior Leadership Team operationalizes** the governance model and convenes the regular Governance Steering Committee meetings. Formalizes the implementation plan, resourcing and owners/leads. Takes ownership of the intake and prioritization process and completes the first portfolio review within 6 months.

3. **The website content management system** procurement is completed and implementation work begins.
4. **Design of Service North Bay** for Phase 1 of the Service North Bay implementation is planned, including the required training, knowledge base and Service Level Agreements for Phase 1 services.
5. **Information Services begins** the PSD Citywide CRM and Customer Portal module implementation.
6. **Work begins on NaviLine Modernization** to move the product to the cloud and begin configuration updates which enable expanded and enhanced use.

15.3 Wrap Up and Call to Action

The Digital Modernization and Corporate-wide Customer Service Strategy represents an integrated Strategy with a single shared trajectory: put the customer first, use digital where it makes sense, build the capability and capacity to deliver modernization initiatives, establish Service North Bay as the visible face of the change, and move the work forward in small iterative phases with measurable and demonstrable outcomes.

However, the work ahead is substantial and perhaps unprecedented in North Bay's history. The gap between expectations and service delivery today is wide. The supporting foundations need as much attention as the customer-facing services, and the City's delivery capacity is significantly limited.

Key risks to successfully implementing this Strategy include organizational capacity constraints, change management challenges, competing operational priorities, funding availability, and the successful implementation of foundational initiatives such as governance, website modernization, CRM deployment, and telephony replacement.

These risks are mitigated through various other recommendations in the Strategy including the establishment of effective governance, portfolio transparency and regular rebalancing, as well as the introduction of project and change management best practices.

Success will depend on the City's ability to dedicate appropriate resources, maintain focused attention, and invest consistently over time. Budget, staffing, and leadership commitment must be aligned with the plan to ensure successful delivery.

We believe this Strategy provides a clear direction, a structured roadmap, defined accountabilities, and the governance needed to ensure initiatives are delivered in a coordinated and disciplined manner.

The first wave of work is achievable and will deliver visible results inside the first year, and the conditions for success are within the City's control. With Council and SLT's endorsement and active support, the City of North Bay can begin the important work of modernizing to deliver services that residents, businesses, and visitors are expecting, and of which the City can be proud.

Appendix A – Detailed Implementation Plan

Below are all initiatives mentioned in the Strategy, grouped by workstream. Proposed years are shown relative to approval, with Year 1 beginning when Council approves the Strategy (targeted for August 2026).

Priority: P1 = foundational first-wave work; P2 = high-value work that follows once dependencies are in place; P3 = scheduled where capacity allows. Size: S = small (weeks, low effort); M = medium (several months, moderate effort); L = large (major program, high effort).

Order of magnitude estimates for CapEx (one-time) and OpEx (annual, ongoing) have been prepared by Perry Group based on industry experience only where items can be credibly estimated. In some cases, ideas and concepts need to be more fully developed before realistic estimates can be identified. These estimates will need to be further refined by City staff as part of implementation planning and where funding is required, requests will be made via the regular planning and budgeting cycles.

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
GOV-1	Adopt governance model; establish SLT as Governance Steering Committee	P1	M		0	X					
GOV-2	Stand up Program Groups	P1	S		0	X					
GOV-3	Stand up Technical Standards and Review Team	P1	S		0	X					
GOV-4	Stand up Data and GIS Community of Practice	P1	S		0	X					
GOV-5	Implement intake/prioritization process	P1	M		0	X	X				
GOV-6	Develop policy framework (AI, data, records, cyber, cloud)	P2	M	30,000	0	X	X	X			
GOV-7	Annual Strategy refresh and regular Council updates	P2	S		0	X	X	X	X	X	X
GOV-8	Quarterly portfolio review by SLT	P1	S		0	X	X	X	X	X	X
GOV-9	Develop and publish corporate technology standards	P1	M		0	X	X	X	X	X	X
GOV-10	Develop architecture blueprints	P2	M		0		X	X	X	X	

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
GOV-11	Document decision-right thresholds	P2	S		0	X					
GOV-12	Establish additional Communities of Practice	P3	M		0		X	X	X	X	
GOV-13	Establish Benefits Register	P2	S		0	X	X	X	X	X	X
CF-1	Service North Bay Phase 1 design	P1	L		0	X					
CF-2	PSD Citywide CRM implementation and configuration	P1	M	50,000	25,000	X	X				
CF-3	Determine staffing for Phases 2 and 3	P2	S		TBC			X	X	X	
CF-4	City Hall reconfiguration (design + build)	P2	L		0		X				
CF-5	Service Level Agreements for Phase 1 services	P2	M		0	X	X				
CF-6	Knowledge base build for frontline staff	P2	M		0	X	X	X	X	X	
CF-7	After-hours service vendor procurement	P2	S		50,000		X				
CF-8	Service North Bay Phase 1 launch	P1	L	200,000	0		X				
CF-9	Service North Bay Phase 2 launch	P2	L	200,000	0			X			
CF-10	Voice of the Customer function stand-up	P3	M	25,000	0				X	X	
CF-11	Service North Bay Future Phases (Water/Wastewater, satellites)	P3	L	100,000	0					X	
CF-12	Customer service dashboard build and launch	P1	M		0	X	X	X			
CF-13	Publish Promise, Service Commitments, standards and targets	P2	S		0	X					
CF-14	Complete the NBSL	P2	M		0		X	X			
CF-15	Customer research, personas and Target Customer Experience	P3	M	40,000	0			X	X	X	

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
CF-16	Back-office system access for Customer Service Associates	P2	M		20,000	X	X				
DS-1	Stabilize website with security patches	P1	S		0	X					
DS-2	Website CMS procurement close-out	P1	S		0	X					
DS-3	Website CMS implementation and launch	P1	L	350,000	50,000	X	X				
DS-4	Fire, EDD and other microsites migrated to main City site	P2	M		0	X	X				
DS-5	Information architecture redesign	P2	M		0	X	X				
DS-6	Content rewrite to Grade 6 reading level	P2	L	50,000	0	X	X	X			
DS-7	Priority new digital services (Wave 1)	P1	L	50,000	20,000		X				
DS-8	Priority new digital services (Wave 2)	P2	L	50,000	20,000			X			
DS-9	Priority new digital services (subsequent waves)	P2	L	50,000	20,000				X	X	
DS-10	Forms migration to new platform	P2	M	20,000	20,000		X	X			
DS-11	Corporate payment modernization	P1	M	200,000	0		X	X			
DS-12	AI Roadmap	P2	S		0		X	X			
DS-13	Public engagement platform investigation (and potential implementation)	P3	S	10,000	30,000		X				
DS-14	Digital service promotion	P3	S		10,000		X	X	X	X	X
DS-15	Develop the reusable service pattern library	P1	S					X	X		
DS-16	Establish the joint web operating model	P2	S		0	X	X				
DS-17	Standardized uptake and digital satisfaction measurement tool	P2	S		0	X	X				

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
BS-1	HRIS procurement	P2	M		0		X				
BS-2	HRIS implementation	P2	L		Previously Approved		X	X			
BS-3	Xplor Recreation – Facility Booking modernization	P2	M		Previously Approved	X	X				
BS-4	Xplor Recreation – Program Registration software	P2	M		Previously Approved		X	X			
BS-5	Xplor Recreation – Marina management solution	P3	S		Previously Approved		X				
BS-6	NaviLine modernization / improvements	P2	M		200,000	X	X	X			
BS-7	Tax portal implementation	P2	M		50,000			X	X		
BS-8	Finance system / ERP strategy review	P3	S	50,000					X		
BS-9	Work and Asset Management review	P2	L	75,000			X	X			
BS-10	Work and Asset Management systems rationalization implementation	P3	L	400,000	TBC				X	X	
BS-11	Public safety NG911 / CAD upgrades	P2	L		TBC		X	X			
BS-12	Fire RMS modernization (CriSys)	P3	M		TBC		X	X			
BS-13	Transit modernization roadmap	P3	S	50,000			X				
BS-14	Transit systems modernizations	P3	L		TBC			X	X	X	
BS-15	PSD Citywide platform expansion	P2	M	100,000	50,000		X	X	X	X	
BS-16	Microsoft 365 assessment and adoption roadmap	P2	M	50,000		X	X				
BS-17	Corporate document management approach	P2	M	350,000	100,000			X	X		
BS-18	Records management system implementation	P2	L	170,000	100,000				X	X	

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
BS-19	Copilot deployment	P3	M		0	X					
BS-20	GIS-led service opportunities roadmap	P3	M		0	X	X	X	X	X	
BS-21	HRIS assessment and detailed implementation plan	P1	S	0	0	X					
FT-1	Telephony platform replacement	P1	M	350,000	200,000		X				
FT-2	Integration platform stand-up	P2	L	100,000	40,000		X	X			
FT-3	Single Sign-On implementation	P2	M		0		X	X	X	X	
FT-4	Cybersecurity strategy and strengthening	P1	L	100,000	100,000	X	X				
FT-5	Ongoing infrastructure platform modernization	P2	L		Previously Approved	X	X	X	X	X	
FT-6	Disaster recovery plan	P2	M	100,000				X			
DC-1	Customer Service training curriculum	P1	M		20,000	X	X				
DC-2	Digital Education Program	P2	M		20,000		X				
DC-3	ITSM discipline stand-up	P2	M	100,000	25,000		X	X			
DC-4	Workforce planning annual cycle, including capital funding resources to support program delivery	P2	S		TBC	X	X	X	X	X	
DC-5	Change management plan and rollout	P1	L	10,000	0	X	X	X			
DC-6	Project management methodology and training	P2	M	25,000			X				
DC-7	Change management methodology and training	P2	M	25,000			X				
DC-8	Information Services realignment	P1	M	200,000	TBC	X	X				
DC-9	Web team capacity increase	P1	S		50,000						

ID	Initiative	Pri	Size	CapEx	OpEx	Y1	Y2	Y3	Y4	Y5	Y6
DC-10	Establish supplemental resourcing mechanisms	P1	M		0		X	X	X	X	
DC-11	Ongoing technology training program	P3	M		50,000		X	X	X	X	

Appendix B – Recommended Corporate Customer Service Standards

These are Perry Group's recommended corporate customer service standards, organized by channel. They translate the customer service principles into commitments for how staff serve customers in whichever way they contact a municipality.

Standards common to every channel

- No wrong door. Staff provide a warm transfer or arrange a call-back through a CRM.
- Respectful, courteous, caring and clear in how we speak and write, free from jargon and buzzwords.
- Tell customers what happens next and provide progress updates in a timely manner.
- Acknowledge voicemails within one business day and written inquiries within two business days.

Phone

- Callers always have the option of a live response on the City's main line during business hours.
- For direct lines, when staff are unavailable, calls route to a back-up or to a voicemail box that lets the caller press 0 to reach a colleague. The back-up's name and extension are included in the greeting.
- Voicemail greetings are updated for any absence of one or more business days.
- Phones are forwarded to voicemail when away from the workstation and outside business hours, so callers are not left waiting.
- Voicemails are returned within one business day.

Email

- All emails are acknowledged within two business days.
- Where an inquiry needs deeper investigation, it is acknowledged and the customer is given an expected timeframe.
- An Out of Office autoreply is set for absences of two business days or more, naming a back-up contact.
- Email signatures include name, title, department and phone number, with pronouns and designations optional.

In person

- Keep in-person wait times under five minutes, recognizing that busy periods such as lunchtimes and tax due dates may be longer.
- Staff wear name badges and introduce themselves by name.
- Staff help customers with information, completing forms and requests, and using the website and online services.
- We provide a welcoming, safe and accessible environment, with clear signage, and can arrange to discuss issues in private where needed.

Online

- The website is kept up to date and accurate, written in plain, user-centred language at a Grade 6 reading level.
- Staff actively promote the website and online services to customers.
- Staff help customers use online services and help resolve issues they run into.
- Phone and in-person options are always available for those who do not want to use online services.

Live chat

- Aim to respond to live chat within five minutes.
- Agents introduce themselves and provide their name as part of the interaction.
- Transcripts are saved to the CRM and linked to the customer's record where available.
- The customer is given a service request number for future follow-up.

Microsoft Teams (internal collaboration)

- Set your Teams status each day to show if you are working in office or remotely.
- Use status settings (Available, Busy, Do Not Disturb, Be Right Back, etc.) and a short status message so colleagues know when you can be reached.
- No one is obligated to respond immediately to a Teams message when unavailable or out of the office.

Appendix C – Glossary of Key Terms

This glossary defines the acronyms, concepts, assessment models and systems referred to throughout the Strategy.

Acronyms and Abbreviations

Term	Definition
ADKAR	Prosci's change management model: Awareness, Desire, Knowledge, Ability, Reinforcement.
AI	Artificial Intelligence.
BI	Business Intelligence (reporting and analytics capability).
CAD	Computer-Aided Dispatch (public safety dispatch system).
CAO	Chief Administrative Officer.
CFO	Chief Financial Officer.
CMS	Content Management System (the platform a website runs on).
CRM	Customer Relationship Management (system for logging, routing and tracking customer requests).
CX	Customer Experience.
DMM	Digital Maturity Model.
ERP	Enterprise Resource Planning (core corporate business system).
FCR	First-Contact Resolution.
FOI	Freedom of Information.
GIS	Geographic Information System (mapping and spatial data).

Term	Definition
HR	Human Resources.
HRIS	Human Resources Information System.
IT / IS	Information Technology / Information Services (the City's technology department).
ITSM	IT Service Management (how IT support and internal services are delivered).
KPI	Key Performance Indicator.
KPMG	The firm that completed the City's 2023 Organizational Review.
M365	Microsoft 365.
MOSA	Municipal Online Services Assessment.
MRP	Municipal Resource Planning (the municipal equivalent of corporate ERP).
MSL	Municipal Service List.
MTM	Municipal Technology Model.
NBSL	North Bay Service List (the City's version of the Municipal Service List).
NG911	Next Generation 911.
PMI	Project Management Institute (source of the project management practices referenced in the Strategy).
PSD	Vendor of the PSD Citywide platform (PSD Citywide).
RFP	Request for Proposal.

Term	Definition
RMS	Records Management System (public safety, for example the Fire records system).
SLT	Senior Leadership Team.
SME	Subject Matter Expert.
SNB	Service North Bay.
SSO	Single Sign-On (one login across multiple systems).
TBC	To Be Confirmed.
Xplor Recreation	The City's recreation management system.

Key Concepts and Terms

Term	Definition
Service North Bay	The City's consolidated front door for public-facing services: one team, one location at City Hall, one phone number, one email and one website location, introduced in phases.
The six workstreams	How the Strategy is organized. Four focus on what needs to be done (Customer Forward, Digital Solutions, Business Solutions, Foundational Technology) and two on how it is delivered (Governance, Delivery Capability).
Guiding principles	The eight standards that guide every service, digital and technology decision, for example Digital First not Digital Only, No Wrong Door, and One City, One Customer.
Channel	A way a customer interacts with the City: phone, email, in person, website or mobile.

Term	Definition
Assisted digital	Staff helping a customer complete a service using the same digital tools the customer would use, so there is one process behind every channel.
First-contact resolution	Resolving a customer's request during the first interaction, without escalation or a call-back.
Voice of the Customer	A function that systematically gathers and acts on customer feedback to improve services.
Personas and customer segments	A small set of named customer types the City designs services around, for example a working parent registering for recreation.
Single Customer Record	One shared record of a customer's dealings with the City, so information is given once and reused across services.
Master data and data governance	Agreed definitions and a single source of truth for key data such as customers, addresses and assets, plus the rules and roles that keep it accurate.
Composable ERP	Modernizing core business systems in modular steps rather than replacing everything with one large ERP, which lowers risk and delivers value sooner.
NBSL	North Bay Service List. A maintained list of the City's customer-facing services with their volumes, standards and digital availability.
Service standards and performance targets	The commitments the City measures against, for example 80% first-contact resolution and 80% of calls answered within 30 seconds.
Digital adoption	The share of customers using a digital service. The Strategy sets a corporate target of 80% for new digital services.

Term	Definition
Service owner and product owner	Named accountabilities. A service owner is accountable for a service end to end; a product owner is accountable for a shared platform across its full lifecycle.
Intake and prioritization	The governed process for receiving, assessing and ranking new digital and technology requests.
Portfolio management	Managing all digital and technology initiatives as one portfolio, reviewed regularly by the Senior Leadership Team.
Governance Steering Committee	The Senior Leadership Team acting as the body that owns intake, prioritization and oversight of the Strategy.
Technology Standards and Review Team	An advisory group of IT and service-area experts that reviews solutions, standards and architecture.
Technical debt	The accumulated cost of aging, underused or poorly integrated systems, which makes future change slower and more expensive.
Plain language (Grade 6)	Writing website and service content at a Grade 6 reading level, the provincial standard for accessibility.
Workstream codes (CF, DS, BS, FT, GOV, DC)	The prefixes used to number initiatives in the implementation plan: CF Customer Forward, DS Digital Solutions, BS Business Solutions, FT Foundational Technology, GOV Governance, and DC Delivery Capability and Capacity.
Priority and size codes (P1–P3, S/M/L)	Implementation plan shorthand. Priority: P1 foundational first-wave work; P2 high-value work once dependencies are in place; P3 scheduled where capacity allows. Size: S small, M medium, L large.

Assessment Models

Term	Definition
Municipal Technology Model (MTM)	Perry Group's four-layer reference model, Infrastructure, Business Solutions, Integration and Data, and Customer-Facing, used to assess a city's technology environment.
Digital Maturity Model (DMM)	A 5-stage scale from Digital Resister to Digital Master, scoring people, process and technology.
Customer Service Maturity Model	Perry Group's 8-stage scale placing the maturity of a city's customer service operating model.
Municipal Online Services Assessment (MOSA)	A benchmark of the breadth and quality of online services against comparator municipalities and digital leaders.
Municipal Service List (MSL)	Perry Group's inventory of customer-facing services with transaction volumes and digital availability. The City's version is the North Bay Service List (NBSL).

Systems, Platforms and Vendors

Term	Definition
PSD Citywide	The vendor and platform used for building permits today. Its Service Request and Customer Portal module is the near-term CRM foundation.
NaviLine	The City's current core finance and ERP system, to be modernized on an interim basis and migrated to the cloud.
Xplor Recreation	The recreation management system for facility rentals and program bookings.
Esri	The City's enterprise GIS platform, a widely used municipal standard.

Term	Definition
Microsoft 365 and Copilot	The City's productivity and collaboration environment. Copilot is the embedded AI assistant.
CriSys Fire RMS	The Fire and Emergency Services records management system, to be modernized.
NG911 and CAD	Next Generation 911 and Computer-Aided Dispatch systems, updated in partnership with North Bay Police Service.

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