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# The County of Simcoe Improves Resident Services and Streamlines Operations with HEAT Service Management

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## ORGANIZATION

**Name:** County of Simcoe

**Location:** Ontario, Canada

**Industry:** Government

**Website:** [www.simcoe.ca](http://www.simcoe.ca)

## SOLUTION

HEAT Service Management, including: Incident Management, Service Request, Problem Management, Knowledge Management, Self-Service, Service Catalog and Survey

## BUSINESS BENEFITS

- Flexibility and customization provide options for differentiated departments
- Automatic ticket creation and routing save time and money
- Better access to data improves reporting accuracy for multiple stakeholders

About 465,000 people live in the County of Simcoe, just north of Toronto. The county administration handles a variety of municipal services for 16 member municipalities plus social and emergency services for two separated cities, including solid waste management services, transportation and engineering, paramedic services and emergency planning, social services including social housing, children's services, and employment services, long term care services, a library, a museum, forest management, a geographic information system (GIS) and tourism.

But with the diverse requirements of so many different departments, the County of Simcoe staff found that a single ticketing system didn't cut it.

"We were trying to squash everybody into one solution," says Karen Cade, business systems analyst at the County of Simcoe. "It never worked."

Customizing didn't work. Neither did best-of-breed niche systems.

Between 2007 and 2014, Simcoe County went through multiple ticketing systems.

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"What's new with HEAT is that we can automatically turn an email into a ticket. That's changed our world."

*James Nightingale, Manager, Customer Service*

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## Turning on the HEAT

In 2014, Simcoe County went out to RFP. Each department detailed their requirements, and after a thorough review, HEAT Service Management met everyone's needs.

"HEAT impressed us with its flexibility," Cade says.

Simcoe County found that HEAT Service Management blends best practices with configurable tools, which allowed it to automate the workflow for a broad variety of business and IT services. With HEAT Service Management, administrators were able to address their service management needs beyond

IT—and support the specific needs and cultures of other departments, including Customer Service, Corporate Communications, Environmental Services, Paramedic Services, Fleet Management, Maintenance and Facilities, and Long Term Care. The County also integrated HEAT with its SAP enterprise software and GIS mapping systems.

With HEAT, Simcoe County was able to deliver better services to its residents and departments—and deliver those services efficiently and with the visibility needed to continually improve services.

### Better, Faster Customer Service

A 12-person Customer Service team is a central point of contact for residents and visitors to access municipal services and information. More than 1,700 staff and contractors as well as the residents can submit requests or report problems to the Customer Service team. It could be anything from garbage that hasn't been picked up on time to a new pothole or a bear sighting. It's fast-paced, time-sensitive and the requests are highly varied.

"HEAT has streamlined a lot of our procedures," Cade says.

In the old system, Customer Service agents manually created tickets based on emails. "That was a huge pain because it was hard to keep track of how many times a ticket was touched," says Cade. "Now HEAT creates the tickets and the conversation happens within the ticketing system."

James Nightingale, manager of customer service, agrees. "With HEAT, we can automatically turn an email into a ticket. It's changed our world," he says.

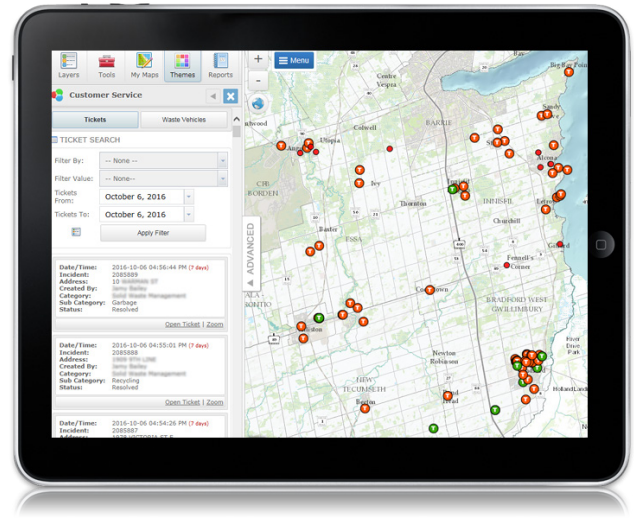
With HEAT, the Customer Service team can address issues more quickly and productively. Information is readily searchable. More complex requests and problems can be routed directly to the appropriate person or department. And with better access to data, the Customer Service team can provide more accurate information to stakeholders.

"It's so much better with HEAT," says Nightingale. "We have 32 politicians, and they come to us, saying, 'I heard this from a citizen,' and they give you a few buzzwords—maybe a street name or a last name. Now we can search the tickets by keyword."

"We can create a keyword for events such as a blizzard," Nightingale says. "Then we can name it—say, Snowmageddon—and report to management or politicians, 'here was the impact.' Using search is a very fast way to do it."

### Improving Municipal Services

Simcoe County's Corporate Communications, Procurement, Fleet and Property, and Paramedic Services departments use HEAT to manage their administrative workflows.



Customer service agents can get a quick overview of residents' complaints and requests garbage collection. HEAT Service Management is integrated with the county's GIS mapping system.

"If there's a request for an event, such as the Warden's annual charity golf tournament, all the tasks related to running that event are assigned within Corporate Communications," Nightingale says. "They can save the date, book the tables, arrange for the speech—everything gets done in HEAT."

Ambulance maintenance and repair is managed through HEAT as well. "When something goes wrong with the ambulances or any other vehicle, that issue is routed from HEAT through SAP to the appropriate dealership in town so the work gets done, along with regularly scheduled maintenance," Cade says.

The paramedics themselves use HEAT in a variety of ways, from tracking "storks and saves"—when they deliver a baby or save a life—to maintaining inventory of medical equipment and supplies on emergency vehicles. That information is then easily reported through HEAT for department managers and council members.

The facilities team, which is responsible for maintenance and remodeling of Simcoe's administrative offices, paramedic bases, social services offices, and road garages, also uses HEAT. Minor problems such as a missing light bulb are handled as service requests directly within HEAT, while bigger issues, such as a leaky plumbing, are entered into HEAT and then automatically created as work orders within SAP.

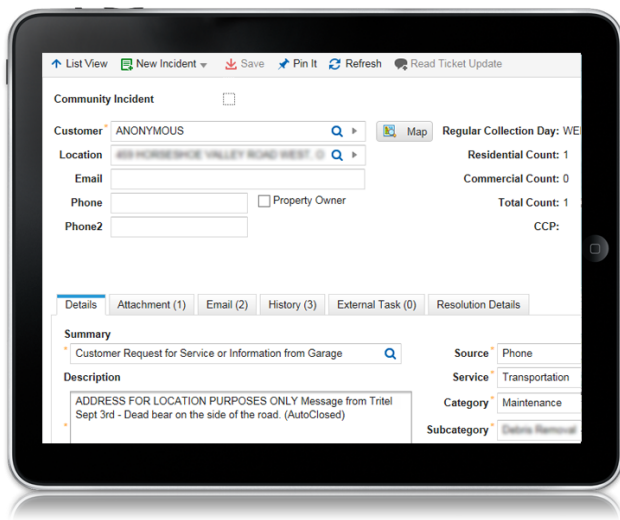
HEAT is also used to manage demand maintenance like work requests, safety concerns and equipment moves at Simcoe's four Long Term Care homes for seniors. Maintenance workers have iPads on their carts so they can close out the tickets once the work has been completed.

### Putting Problems on the Map

Integration between Simcoe’s GIS mapping system and HEAT has delivered even more value for the residents and staff. Let’s take the example of a resident calling to complain that their garbage wasn’t picked up.

“The customer service agent can enter the address into HEAT and look up the map of the area in GIS,” says Henry De Jager, manager of Business Planning and Systems. “They can see exactly when the truck stopped by a residence. They can copy and paste from the map to the ticket, so the external contractors can see what we’re talking about—the guy did drive by and the trash got picked up on time, or maybe the truck went down only one side of the street so far.”

“Someone might report a dead deer on a country road,” says De Jager. The caller can describe the location, and the customer service rep can identify it from the map, associate it with a nearby residential address, and open a ticket in HEAT. “We have a nice back-and-forth integration between HEAT and GIS,” he says.



Simcoe County uses HEAT to track a broad variety of incidents, including when residents report a dead bear on the road.

A recent upgrade lets Simcoe County define and respond to entire neighborhoods—not just individual residences—that might be affected by changes to services in the event of an emergency. That capability also enhances external reporting.

The Solid Waste Management department recently added a new service that’s managed through HEAT. “We just added a bulk item pickup service,” Cade says. “The process is to find out what we’re collecting, request payment for it, receive payment for it, and then issue a receipt. We integrated payments with an external payment processor. Now our

“HEAT has streamlined a lot of our procedures.”

Karen Cade, Business Systems Analyst

guys can collect a dishwasher or couch and close the ticket when they go to the house because they have access to HEAT from their laptop in the truck. It works great.”

### IT Uses HEAT, Too

The IT department uses HEAT to manage incidents and service requests. “We make a distinction between things that are broken and things that we want,” says Cade.

Support is tiered, and if a request is specialized, it can be routed directly to the appropriate team. “Based on what the customer selects, we can direct the ticket automatically,” Cade says. “For instance, GIS problems are a specialized skillset, so those go automatically to that team. We have SAP in-house, so that goes to my team. If we can’t automatically figure it out based on a customer’s selection, it goes to the help desk.”

### Self-Sufficient, with Expert Guidance

Simcoe County turned to Kifinti, a consulting firm based in Toronto, for assistance prototyping and implementing HEAT Service Management.

“Our team was excited to work with the County of Simcoe on this initiative,” says Paul Kelsey, a consultant at Kifinti. “The creation of a singular client portal for all internal staff to request services from essentially all internal departments is something we have been encouraging all customers to do for years. Additionally, the expansion of the same platform to be used for customer service again reinforces the benefit of a singular workflow platform that can be used to automate processes for the whole business is now a reality.”

“What is more exciting is these solutions like HEAT are very advanced and not expensive or overly complex but can be cost effective and easily managed by internal resources,” says Kelsey.

Cade seconds that view. “This is not my full-time job by any stretch, but I’m self-sufficient with the assistance of Kifinti for things I don’t do often and need help with,” she says.

### Lessons Learned

Simcoe County uses HEAT for a broad variety of business and IT service management, but that success hasn’t come without lessons learned.

“Start with a prototype,” Cade advises others who are embarking on a business service management initiative. “We tried to do standard requirements gathering, but we had too many stakeholders and too many ideas. People couldn’t conceptualize what the system should look like.”

## Next Steps

With the success of service management evident across so many departments, Simcoe County continues to advance its use of HEAT. Cade is ticking off a list of maintenance requests and also has turned her attention to creating a new business workflow to better support the paramedics and add new lines of business. In addition, IT is deploying a new business phone system, and integration with HEAT Voice will allow it to add call recordings to tickets as needed, which is especially important for Customer Service.

But so far, Simcoe County is pleased with what they've already accomplished with HEAT Service Management. "Other municipalities are gobsmacked when they see what we can do with HEAT," Nightingale says.

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## About Kifinti

Kifinti, which means "How are you?" in Maltese, is focused entirely on helping deliver more effective service through the implementation of best practices focused around service, asset, endpoint and identity management. Our expertise is helping organizations transform the organizational processes and is based on adopting industry best practices like ITIL, COBIT, ISO 9000, implementing technology solutions to support those processes. Our consultants, our methodology, our team and our strategy have all been chosen in support of this.

Our total service offering is intended to provide start-to-finish "partner" style implementation and evolution of our customer's needs. This includes definition of process, selection and implementation of tools, integration with a customer's existing technology, customization and extension of the solution set, testing, training, support and documentation.

Kifinti Solutions Inc. has been a premier HEAT Software partner since our inception in 2003. Our strong team of consultants has been successfully implementing, customizing and integrating HEAT for hundreds of HEAT customers for over 12 years.

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