

## RESOLUTION OF CUSTOMER INQUIRIES

Procedure Number:	FS-00PR-01
Approved by:	PENDING CITY MANAGER APPROVAL
Last Review Date:	[UPDATE WHEN APPROVAL IS GRANTED FOR CC-72]
Procedure Owner:	Finance and Corporate Performance

### PURPOSE

This procedure establishes the administrative actions for managing interactions with Customers in accordance with the Council Policy CC-72: Customer Code of Conduct. It aims to ensure that all Customer interactions with City Representatives are conducted in a manner that is respectful, productive, and aligned with the expectations set forth by the City Council.

### DEFINITIONS

Term	Description
<u>City Representative:</u>	Includes but is not limited to any council member, employee, volunteer, contractor, etc.
<u>CRM:</u>	Customer Relationship Management.
<u>Customer:</u>	Any individual who interacts with City Representatives, irrespective of the nature or purpose of their Interaction and regardless of whether a monetary exchange is involved.
<u>Interaction:</u>	The written, verbal, or in-person communication of a Customer in the form of inquiries, requests, or direct involvement with a City Representative.
<u>Interactions Under Review:</u>	Interaction(s) that are identified as being in potential breach of the Customer Code of Conduct Policy.
<u>Review:</u>	A formal assessment of all details of an Interaction Under Review, including the efforts of the City in resolving the Interaction Under Review and future expectations for the Customer.

### PROCEDURE

1. **Experience Breach of Policy:** A City Representative experiences a potential breach of the Policy.

## RESOLUTION OF CUSTOMER INQUIRIES

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2. **Submission of Interaction(s):** The potential breach, including details of the Interaction(s) Under Review, are submitted in writing, to the Inquiry Resolution Administrator (IRA).
3. **Assessment for Breach of Policy:** The IRA Reviews the potential breach and any other relevant Interactions with the Customer to determine if there was a breach of Policy.
4. **Consideration of Restrictions:** If there is a likely breach of the Policy, the IRA may propose restrictions on the Customer for a reasonable period. These restrictions must relate directly to the breach and be proportionate in nature to the breach.
5. **Notice of Changes or Restrictions:** If restrictions are proposed on the Customer, the Customer must be notified in writing (email or letter) and provided with an opportunity to make written representations to the IRA within 10 business days. This notification will include:
  - Details of the Interaction(s) breaching the Policy.
  - Investigation details that determined the breach.
  - The proposed restrictions being placed on the Customer with reasons
  - An opportunity for the Customer to make written representations to the IRA about the Interaction(s) Under Review and the proposed restrictions.
6. **Decision:** The IRA will consider any written representations made by the Customer regarding the Interactions Under Review and/or, the restrictions being considered. The IRA will make a final decision and notify the Customer in writing.
7. **Restriction Implementation:** The IRA informs the City Manager, and detailed notes are entered into the CRM case file.
8. **Reassessment and Adjustment:** The IRA reassesses the Customer's record annually and adjusts as necessary, communicating any changes in writing.
9. **Right of Appeal:** Customers may appeal decisions to the City Manager on the record established above. Customers have a period of 10 business days to appeal from the date of receiving notice of restrictions.

### REVISION HISTORY

Review Date	Description
[See Pg 1. Header]	New Administrative Procedure – Effective Date.