

# Committee: Overview and Scrutiny Commission

Date: 28 February 2013

Agenda item: 8

Wards: All

## Subject: Customer Contact Strategy

Lead officer: Sophie Ellis, AD Business Improvement

Lead member: Cllr Betteridge, Deputy Leader and Cabinet Member for Performance and Implementation

Forward Plan reference number: TBC

Contact officer: Rob Blanden, Interim Programme Manager: Customer Contact

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### Recommendations:

- A. That the Commission review and comment on the draft Customer Contact Strategy prior to submission to Cabinet.
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## 1 PURPOSE OF REPORT AND EXECUTIVE SUMMARY

- 1.1. This aim of this report is to present the OSC with a draft of the refreshed Customer Contact Strategy for review and comment
- 1.2. The Customer Contract Strategy defines the key design principles and the outcomes for the Customer Contact programme. The Strategy will inform the Channel Management Plan document, which will contain the detailed actions required for the implementation of the Strategy.

## 2 INTRODUCTION AND BACKGROUND

- 2.1. In July 2012 Cabinet approval was secured for a programme of work to improve the way the council interacts with its customers, subsequently named the Customer Contact Programme. The Commission have asked to be kept fully informed about the progress of the programme going forward.
- 2.2. The vision for the programme is as follows:
- (i) Make services more accessible for customers and enable services to be delivered **right first time, on time.**
  - (ii) Procure and implement the necessary IT systems to develop a '**Single View of the Customer**' across the Council so that the council can approach customers' queries and requests in a more holistic way, with all the relevant information to hand for swift and immediate resolution.
  - (iii) Work with service users to identify and implement opportunities to move appropriate transactions to access channels that are cheaper to manage and service and re-design business processes so that the customer is at the centre of everything we do.

- (iv) Ensure that all activity incorporates a comprehensive approach to **change management** that incorporates customers, staff and partners in order to ensure all stakeholders are fully engaged and benefits realised.
- 2.3. In January 2013 officers presented to the Commission an update of progress on the programme to date, including the appointment of an interim programme manager and commencement of recruitment to the fixed term position; as well as planned work to refresh the Customer Contact Strategy and begin the recommended procurement exercise.
- 2.4. Since January 2013, a key area of work within the programme has been the refresh of the Customer Contact Strategy. This is due for submission to Cabinet for approval on 11th March. It was agreed that the refreshed draft Customer Contact Strategy would be presented to the Commission at its February meeting for input prior to submission to Cabinet.
- 2.5. In order to focus the discussion this report does not provide a detailed update on the wider programme, but instead concentrates on the refreshed Strategy. The Commission are asked to accept a further update at a future meeting on the scope and progress of the programme more widely.

### **3 MERTON'S CUSTOMER CONTACT STRATEGY**

- 3.1. The latest draft of the strategy (version 3.5) is attached to this report for consideration. OSC are asked to note that there are still some elements of the strategy that are being drafted. Further comment and input is also expected as a result of consultation underway at the time of writing this report with colleagues across the organisation
- 3.2. The strategy has been written as an internal document; a more accessible version will be developed for the wider public once the strategy has been approved. Officers are grateful to Dr Jo Lyons for agreeing to be involved in final proof reading to ensure a document that is jargon-free and accessible.
- 3.3. The draft strategy is based on best practice from a number of other Authorities, e.g. Surrey CC, LB Croydon, LB Sutton, Somerset CC.

### **4 ALTERNATIVE OPTIONS**

- 4.1. There is no alternative option for the Customer Contact Strategy. It is considered essential for the organisation that the principles of the Customer Contact Strategy are adopted for the long term, particularly 'putting the customer at the heart of everything we do'.
- 4.2. Alternative options will be considered during the design of specific solution(s) and the detailed action planning that will be undertaken as part of the Channel Management Plan.

### **5 CONSULTATION UNDERTAKEN OR PROPOSED**

- 5.1. Officers across the organisation have been involved in the production of the strategy. A steering group has been established and will be supported by a series of working groups to ensure the full engagement of staff across service areas in the action planning process.
- 5.2. A more accessible version will be developed for the wider public once the strategy has been approved and an associated communications plan will set

out the process for engaging residents and service users in the action planning going forward.

- 5.3. Internal champions are being identified to support the change management efforts of the programme across departments.
- 5.4. External stakeholders are also being identified to provide peer review of the Customer Contact Strategy and also to provide support for the programme as it delivers specific changes for customers.
- 5.5. Specific customer consultation will be undertaken for specific changes to access channels or services as and when they are proposed by the programme. It is intended to involve customer champions in the design of specific changes.

## **6 TIMETABLE**

- 6.1. An appointment has been made to the fixed term Programme Manager's post. This will introduce the necessary capacity to refresh and update existing programme documentation including spending timescales, workstreams, phases of work, priority of activities, etc.
- 6.2. Pending the arrival of the Programme Manager, the interim post holder will continue to develop, in consultation with businesses, the high level specification of technical requirements and a process and timescales for action planning. This activity is being prioritised as a key enabling strand of the programme. The procurement exercise will begin in March with a bidders' day to engage potential providers and set out the council's ambition and requirements. The aim will also be to gather intelligence from the market to feed into the final high level specification of requirements to be issued shortly thereafter along with the Pre-Qualification Questionnaire.
- 6.3. A communications plan and change management plan are currently being developed that sets out the timescales for publication of the strategy and consultation on and customer (and staff) engagement in actions to be taken going forward.

## **7 FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS**

- 7.1. The budget for the customer contact programme has been approved by Cabinet.
- 7.2. The detailed resource requirements for the programme are currently being reviewed in the context of the approved budget.
- 7.3. No property implications have been identified for the programme. However, the review of the face-to-face access channel will include a review of all properties in the borough that provide access to customers, as well as a review of the spatial implications of the key customer access properties.

## **8 LEGAL AND STATUTORY IMPLICATIONS**

- 8.1. The OJEU competitive dialogue procurement exercise will require significant commercial and legal input into the process itself, the formation and approval of the contracts and the management of the supplier(s) on-going.

## **9 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS**

- 9.1. An Initial Equalities Analysis will be completed for the Customer Contact programme.
- 9.2. Detailed Equality Assessments will be produced for any significant changes that are made to access channels or services that impact our customers.
- 9.3. The requirements for a privacy assessment are being reviewed.
- 9.4. Implications for the Data Protection Act (DPA) will also be considered as part of the programme.
- 9.5. No community cohesion implications have been identified for the programme.

## **10 CRIME AND DISORDER IMPLICATIONS**

- 10.1. None.

## **11 RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS**

- 11.1. The main risk to the programme is the difficulty in effectively engaging key stakeholders, from senior officers, members and customers themselves.
- 11.2. An initial risk review workshop has been undertaken with the programme steering group and this will be followed by a detailed risk assessment workshop with a wider range of internal stakeholders.
- 11.3. At this stage, no H&S implications have been identified for the programme.

## **12 APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT**

- Customer Contact Strategy

## **13 BACKGROUND PAPERS**

- Merton Customer Service Charter
- Scrutiny Review of Customer Access and Proposed Action Plan – report to Cabinet 7 November 2011
- Scrutiny Review on Customer Access – report to Cabinet 20 June 2011
- LB Merton Channel Strategy May 2010
- Customer Contact Options Appraisal – report to Cabinet 2 July 2012
- Call in of decision taken by Cabinet member for Performance and Implementation – Customer Contact Options Appraisal – OSC 25 July 2011



# **CUSTOMER CONTACT STRATEGY**

v.3.5 Draft

February 2013



**Version control: (this table will not appear in final version)**

<b>Authors</b>	Rob Blanden – Interim Customer Contact Programme Manager Sophie Ellis – Assistant Director of Business Improvement
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## Executive Summary

The way in which Merton borough residents and service users want to access services is changing. People who routinely buy services and goods over the internet and by phone, and who communicate via SMS (text messaging), Facebook and Twitter increasingly expect corresponding flexibility in access to public services.

Our residents' survey<sup>1</sup> demonstrates that Merton's residents already use a range of different access routes into council services; and that younger residents in particular no longer want to come to council offices but instead prefer to use the web, e-mail and SMS when contacting the council.

Service users are also increasingly expecting services to be delivered in an holistic way, that the council is proactive in interpreting their requirements and responding to them swiftly. When someone contacts the council they expect that there is a coherent and complete 'view' of them within the organisation – this is their experience of other organisations so why not the council? Customers do not want to speak to several different departments and service teams about the same thing – services can no longer afford for their business systems and their relationships with customers to exist in isolation. For the sake of good customer experience, and effective and efficient services, a single, comprehensive view of customers across the organisation is needed.

In parallel with this, and in the context of a very difficult financial climate, local authorities in general are having to find ways to spend less money on service delivery and be more efficient – especially at point of contact with the customer. Merton is no exception; in fact the council is making spending cuts of [*figures to be added following Council decision in March*]. Two effective ways to reduce the cost of services are firstly to resolve queries and requests first time round (to reduce unnecessary time spent revisiting the same query); and secondly to help people do what they need to do quickly online or, if they have one, through their smartphone so they don't have to contact the council at all.

This strategy, then, brings together those service users who want swifter resolution of their queries and the ability to deal with straightforward transactions themselves (through a self-service function) and the council's desire to provide services more holistically but also more cheaply. It sets out the principles and vision that will shape the consequent transformation of our contact with customers over the coming months and years and the outcomes we will aim to achieve for customers:

- Fair access to services
- Choice of routes into the council wherever possible
- Service design and delivery influenced by customer experience
- We get it right first time, on time.

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<sup>1</sup> REFERENCE TO BE ADDED



This overarching strategy also introduces four supporting strategies:

- Avoidable contact – to reduce the need for customers to contact us multiple times for a straightforward enquiry;
- Channel shift – to introduce cost-effective, efficient and user friendly access channels into council services;
- Digital inclusion – to ensure that customer who do not have access to digital technology at home or at work are not disadvantaged in contacting us;
- Accessibility – to provide an appropriate range of contact routes and meet the needs of customers with special requirements.

Our customer contact programme will deliver the strategy, drawing on customer intelligence and experience to redesign services so they are intuitive for customers, introducing better management of access channels so that our services are more cost effective, and introducing the technology needed to achieve our ambition.

# Introduction

## Local context

Merton is an outer London borough, situated to the south-west of the capital. It is suburban in nature, with many residents commuting into and out of the borough to work. 67% of residents work outside the borough, one of the highest figures in London. It has a population of 199,693 (2011 Census), and the population is younger than the national average with a median average age of 34.

According to the Office for National Statistics, in 2009 around 80% of households in London had home internet access with over 75% of the same population accessing the web in the last 3 months. This usage figure varies from 96% accessing the web in the last 3 months for the 16-24 age group down to 30% of the over 65s. 73% of the population accesses the web every day.

Broadband coverage in Merton is widespread. In 2009, 40% of the population were able to access the internet via a mobile phone or other portable connection. 80% of the UK population owned a mobile phone in 2008 and 81% of the population in London currently have access to digital TV channels.

Statistics indicate that in the highest income decile group, 98% of households owned a home computer and 96% had an Internet connection in 2008. This compares with 33% of households in the lowest income decile group who owned a home computer and 26% who had an Internet connection. Whilst it is difficult to find specific figures for the availability of communications technologies in Merton, a survey of 380 visitors to the Link in 2010 showed that 52% of Merton residents using the Link had internet access.

A defining characteristic of the borough is the disparity between the more prosperous west and the poorer, more deprived east of the borough. This presents particular challenges for the local area and the delivery of this strategy will seek to provide a range of choices of access designed to ensure that no individual, group or community is disadvantaged through lack of access to the services that are needed (refer to the 'digital inclusion' section).

Residents' perception of the council and our services feed into the council's corporate priorities and shape the focus of our communications work. Results from our 2012 Annual Residents Survey revealed:

- Crime remains residents' number one concern. However, levels have steadily dropped over recent years, and are significantly lower than the pan-London score.
- Council tax remains the second top concern. Although the level has steadily dropped over recent years, it is still well above the London score.
- Concerns over traffic congestion remain high and are still significantly greater than the London score.
- Concern about rising prices, lack of jobs, lack of affordable housing and the number of homeless people are all significantly lower than the pan-London score.

- Concern over the standard of education is significantly higher in the 35-49 group, these are likely to be respondents who have children at a school age.
- Seventy-nine per cent of residents agreed the council as doing a good job and 54% agreed that they get value for money.
- Thirty-seven per cent of residents perceive the council as difficult to get through to on the phone; this is lower than the pan-London score of 46%
- There was a significant drop in the proportion of residents agreeing that the council responds quickly when asked for help although this is still in line with the London wide score.
- Recycling facilities saw a big leap in performance this year, and is ahead of the London wide score
- Seven services are rated significantly above the pan-London score: policing, parking, recycling facilities, parks and open spaces, refuse collection, local health services and repair of roads and pavements
- Three services are rated significantly below the London wide score: housing benefit services, secondary education and council housing.

The council faces a number of major challenges in communicating [and engaging] with residents, staff and other stakeholders.

- The Government's reductions to local authority grants are having an impact on services that will affect residents and other stakeholders, such as voluntary organisations.
- There is an increasing call for transparency and greater public scrutiny of council activities and spending – our systems need to meet this challenge.
- The changing delivery landscape – localism, Big Society, the end of PCTs and the introduction of Clinical Commissioning Groups – means that councils have to work in new ways with different people.
- , Merton takes on public health services from April 2013; these will undergo a complex transition from Merton and Sutton PCT to the council.
- The tough economic climate means that services which support people are more important than ever.
- The lightning speed in which information can be shared and discussed through social media, means that the council must be more sited on using this medium to engage with the community

## Latest research

In July 2012 RedQuadrant carried out a survey of fifty local authorities to identify current and future models of customer contact. The key findings from this survey are:

### **To improve service, help customers to get things done**

The three most important factors identified in improving service to customers were streamlining work processes, shifting customer interaction to cheaper methods of contact, and improved systems integration (linking business systems so that the 'front' and 'back' office is connected and staff and customers can access all the systems they need in one go).

### **To improve online service, help customers to get things done online**

Most councils are looking to prioritise online customer contact because it is cheaper, but will also continue to service a mix of face-to-face and telephone contact, with customers choosing the most appropriate mix to suit their personal needs. The most critical thing is that however a customer contacts their council they should experience the same level of service and be able to resolve their query first time on time.

### **It is still very hard to get things done online**

Fifty-four per cent of local authorities still only have limited interactive transactional e-services while only 25% have achieved a substantial increase in customers' accessing services online and fully interactive websites.

### **Demand for online services has increased – but so has demand for other access 'channels'**

There was a mixed picture in terms of 'channel shift' – or customers moving to different means of accessing council service such as via the web – over the past three years. Internet transactions have increased for 95% of authorities, telephone for 62% and face-to-face for 35%, with a decrease in face-to-face and telephone contact reported by 12% and 13% of authorities respectively.

### **There is no single agreed future model of local authority customer contact**

Councils are moving over the next three years to a variety of customer contact models – some will prioritise self-service as the preferred means of contact, while others are developing a mixture of contact methods for different types of services and different groups of customers. Overall there is a general (but not complete) move away from traditional models where most transactions need to be dealt with by a range of professionals within departments or service areas.

### **Digital inclusion is increasingly important**

A majority of authorities are making an effort to support digital inclusion using a variety of methods such public access to PCs, assisted self-service and training for customers.

## **Why change is needed**

Customers have long been at the heart of Merton's service design and delivery. As an organisation we are committed to ensuring that we put residents, tax payers, service users and visitors to Merton first. We want our service users to really experience a council that understands that it exists to meet their needs and treats them with respect. We want them to know that the council provides them with excellent value for money.

The results of our annual survey of residents from 2012/3 indicate that there is work for us to do. Thirty-seven per cent of respondents felt that it was difficult to get through to the council on the phone; whilst this is lower than the perception across London as a whole (46% of London residents find their council difficult to get through to on the phone) it demonstrates that access to our services could improve: just 54% of respondents felt that

the council responds quickly when asked for help. The survey also demonstrated that residents are already using a range of different channels to access the council: its website (21%), Facebook (4%) and Twitter (2%) as well as printed material. When asked, 26% of younger respondents stated that they would prefer to contact the council via the web, 19% via e-mail, and 7% by text message (SMS). None of the younger respondents wanted to contact council services through council offices.

Inevitably, the national and local context in which we design and deliver services continues to change and evolve. In addition to those set out above, these are some of the key factors that have prompted us to review our strategy for customer contact:

**Our customers want a greater say in decision-making**

By better understanding how customers interact with services delivered by the council, listening to feedback and engaging service users in service design we can ensure that this is the case.

**Our customers want an open and honest relationship**

By using the information they provide more intelligently we can develop a more consistent customer experience and ensure there is greater transparency and visibility of their interactions with us.

**Our customers want to engage on their terms**

By increasing the range of access points (e-mail, internet, telephone etc) available for services we can make sure that customers are better able to engage at a time and in a way that suits their lifestyle.

**The need to reduce financial expenditure**

Following the government's Comprehensive Spending Review the council is having to make spending cuts of [*figures to be added following Council decision in March*]. This makes it all the more important that we interact with customers in the most efficient way. By resolving more customer queries and requests at the first point we can minimize the impact of these savings on front line services.

**The need to join-up public services across providers**

By understanding customer needs and providing appropriate and effective access routes into services we can ensure high-quality services are commissioned, provided and delivered jointly with other key public sector partners, where appropriate and possible.

**The drive towards greater localism**

By introducing alternative routes into services, partnering with other providers, and increasing transparency and therefore local power within communities and localities we can draw closer to customers and become more agile and responsive.

**The need for individual services to anticipate and plan for demand**

The provision of different levels of services to specific customers requires greater insight into customer needs, behaviours and motivations, plus more information for



customers on the services we offer. This will ensure the right service is delivered to meet their need and reduce inefficient activity that doesn't add any value for customers.

**The need for services to operate in a coherent way and 'know' their customers**

By holding an intelligent picture of our customers (rather than isolated islands of information) it will be easier for our customers to communicate, interact and receive services. It will also mean that our staff are supported and empowered to deliver excellent customer service at the first point of contact.

**The need to design and deliver services around customer needs**

If we are to ensure customers consistently experience the most streamlined and coherent route through our services, we need to understand – on the basis of evidence – customer pathways and this can inform the way we improve and simplify our processes in partnership with other providers so that they make sense to our customers. This resonates with our adoption of lean thinking in business improvement – placing the customer at the heart of services.

To support these changes, we will need to transform the way we work, the way our systems interact with each other and the way some of our services are designed. This strategy is intended to capture what change is necessary and how we will know we've succeeded. Everyone in the council has a part to play in achieving this change.

## About this strategy

The purpose of this strategy is to clearly and explicitly state what customers can expect when they access our services and how we expect this to change over the coming months and years. The strategy will be supported by a number of action plans and delivered through a comprehensive programme of change activity that will touch on every service in the council. Staff right across the organisation will need to be involved in designing, planning and delivering this transformation.

In developing this strategy, we have drawn on feedback from residents and service users as well as our residents' survey. Our approach has also been informed by learning from what has worked well in other local authorities and research undertaken elsewhere to better understand how public services are best delivered in the modern world.

Elected Members will play an important role in our continuing to develop our understanding of, and engage, our customers – they act as a primary route of access into our services and so are a rich source of insight into customers' needs. We also want to acknowledge the significant role local volunteers can play in shaping public services and will look to work closely with them over the coming months as we develop the action plans that will deliver our strategy.

### What do we mean by customer?

Throughout this strategy, we use the term 'customer' to include anyone who benefits from the services we provide. Our customers, then, are those people for whom we work to commission, contract, deliver, and enable services. They are also local citizens, or people coming into the Merton area to work or visit. They may be direct service users, employees of the council, employees of other organisations, elected Members or partner organisations, such as the Police or GPs.

In many cases, our customers may be better understood as those who derive secondary benefit from the way we organise and deliver our services, and not just those who are in direct receipt of them. We know that 'customers' are not always willing recipients of council services, for example when in receipt of a parking penalty notice or anti-social behaviour order. In these and other instances, the council is delivering its regulatory responsibilities that reflect its broader role in influencing and improving civic life in the borough and, in some cases, protecting our most vulnerable residents. There are circumstances, then, where 'customer satisfaction' will relate not solely to the experience of the direct recipient of the service (although there is always a need to take this into account), but to the experience of those impacted more widely by the service.

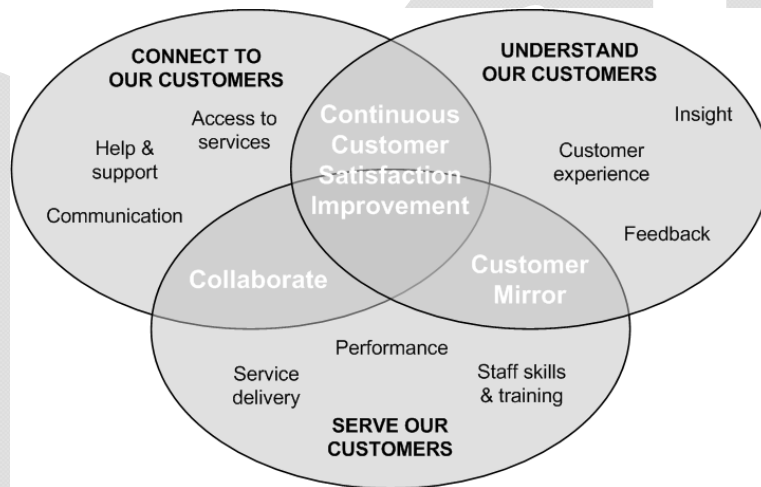
Importantly there will also be times where the council has a responsibility (under law) to prioritise the **needs** of individuals or groups in the borough as part of its role in supporting public life. Where resources are finite and there are competing demands and conflicting needs and desires the council will need to make decisions about services that reflect the wider interests of the borough rather than specific customers.

For this reason, when we involve service users in the design and delivery of our services, as we commit to do in this strategy, we will look to draw on a range of evidence that reflects the wider experiences of those who live, work or use services in the borough rather than simply straightforward satisfaction measures for the direct recipients. In acknowledgement of our responsibility to ensure our services offer good value for money, we will also take account of the cost of service provision as an indicator of our ability to provide customer satisfaction for the public as a whole.

## Our focus

Continuous improvement is a central theme for Merton, something we are all ceaselessly working to deliver. In the area of customer satisfaction we will look to achieve continuous improvement by focusing on three key areas:

- The way we **connect** to our customers so that they can access services
- The way we **understand** our customers' needs and wants
- The way we respond to and **serve** our customers and monitor our success



As this diagram illustrates, by focusing on these areas, we undertake to **collaborate** with customers as we design and deliver services so that they remain at the heart of everything we do. We will also be able to measure our performance on the basis of customers' experience – in effect they provide a '**customer mirror**' that reflects back to us how well we are doing.

## Ongoing review

We will treat this strategy as part of our core business so that it is embedded within our routine work. In order to ensure the activity associated with it continues to evolve as our customers' needs change we will review it annually.





The strategy and its implementation will be the responsibility of the Cabinet Member for Performance and Implementation and the Assistant Director of Business Improvement.

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## Providing value for money

This customer contact strategy is designed to ensure that the services we commission and deliver can be conveniently and efficiently accessed by our customers. But our services also need to be designed and managed to be affordable at a time of scarce resources and funding reductions.

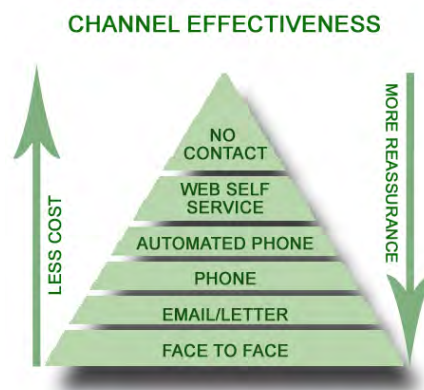
Our strategy will also need, therefore, to ensure that services are accessed in the most cost-efficient way. An important part of achieving this objective is ensuring that services are right first time. Responding to repeat calls or rectifying things that were not handled correctly first time round is not just frustrating for customers but an inefficient use of council time and therefore public money. In delivering this strategy, then, it will be essential that we streamline our processes so that every interaction and intervention adds value for the customer.

We will also need to work with customers to move interaction, wherever it is appropriate to do so, to the most efficient means of contact with the council. We will need to be transparent about the cost of different types of service provision so that customers are engaged with us in the task of reducing the cost of council services.

This will be particularly appropriate to the provision of generic or transactional services, that is to say those services that do not require in-depth, specialist support but rather can be resolved relatively quickly and easily. Examples of these might be:

- Enquiry handling and information provision
- Service requests and application handling
- Appointments, bookings and payments
- Eligibility, assessment and approval

The following model shows how for some types of contact a greater level of human contact is required, particularly for customers that require some level of reassurance.





It is essential that such services continue to receive the necessary level of specialised and customised contact – it is not the aim of this strategy to undermine this. We understand that whilst the methods of contact that are cheaper to service (self-service, internet) may appear desirable in terms of value for money, they may not always be appropriate to the service being delivered.

Importantly, we will engage customers themselves in determining where it is appropriate to move services to cheaper methods of contact. This is absolutely critical, not only because we want to improve satisfaction with our services, but also because the move to more efficient provision relies on collaboration between us as service provider, and our customers as service users.

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## Our commitment to our customers

Our ambition is to make sure that every customer experiences services **right first time, on time.**

Our commitment to our customers is that we will work towards this by:

- Putting customers at the heart of our business
- Making services and information accessible to everyone
- Understanding our customers' needs and wants
- Communicating clearly and openly
- Dealing with complaints proactively
- Keeping our customers informed
- Treating everyone with dignity, respect and courtesy

The above commitments, together with the outcomes, provide the framework for the activity that will deliver this strategy.

Fundamentally we are aiming to make it easier for customers to access services through more cost-effective access routes that are:

- Clearly signposted and more convenient;
- Designed with customers' needs in mind - this means we listen to their needs and make more effort to find out what they want in the future;
- Accessible from home, work or on the move and, when accessed via the internet, at any time of the day;
- Delivered utilising modern access channels (including web, mobile and social technologies) to keep them informed of the services we provide, as well as more traditional channels.

### Outcomes for our customers

It is important at the outset to clearly articulate what impact this strategy will have on customers' experience of our service. It is this, after all, that will provide the measure of our success. We know that moving to different, more cost-effective ways of contacting the council won't be an obvious or easy choice for everyone. Our customer outcomes are designed to provide us with a framework that will help us ensure that the activity associated with this strategy delivers benefits:

#### **Outcome 1: All customers have fair access to services**

- We value diversity and will ensure that the Customer Contact programme will address (and not introduce) any barriers to individual access to services.
- 

#### **Outcome 2: Customers can access services in different ways**

- Wherever possible, we will encourage and enable customers to determine their interaction with the council

- We will work with service users to ensure the most appropriate and efficient access to individual services
- Wherever possible, we will provide seamless delivery across the principal access channels – face to face, telephone and online

**Outcome 3: Customers influence the design & delivery of the services available for them**

- We will make sure we learn from our interaction with customers to further improve access to services
- We will place customer experience and feedback at the heart of service commissioning and re-design

**Outcome 4: Customer needs are, wherever possible, resolved at the first point of contact and on time**

- We will ensure we have a consistent and comprehensive understanding of our customers and, as far as possible, anticipate their needs
- We will ensure all access points have access to and provide consistent information, advice and tools to resolve queries at the first point of contact
- All front-line staff will be trained and enabled to provide resolution at the first point of contact for as many queries as possible.

**Outcome 5: Customer feedback drives service improvement**

- We will place customer feedback at the heart of our performance management framework
- We will place customer feedback at the heart of our commissioning framework
- We will publish satisfaction levels against a set of measurable customer service standards

## Implementation

Achieving the outcomes set out in this strategy will require that we continue to develop our working practices so that the customer is firmly placed at the centre of all we do.

Building on work already undertaken using lean and other tools to support continuous improvement, we will need to:

- Integrate front and back office processes and systems to create a culture of 'first time on time';
- Transform our service delivery process end-to-end to allow the council to provide an holistic service to the customer;
- Forge stronger links with other public and private sector partners to ensure that delivery is seamless in a growing local governance environment; and
- Embrace the power and application of web, mobile and social technology to empower people to become more self-sufficient.

We will need to develop a '**single view of the customer**' across all our business systems, so that there is a complete and comprehensive picture of a customer's interactions, whilst maintaining privacy and ensuring sensitive data are carefully managed. We will need to ensure that this can be viewed by both staff and customers, so that at any given time customers can use a '**customer portal**' to view the status of all their interactions with us in a way that is meaningful.

To ensure services are organized around customers, rather than for the convenience of the organization, we will look to design this capability around key customer journeys for the most common service requests and 'life events' such as moving into the borough, becoming a parent, applying for a school place, amongst others.

### The customer contact programme

We will invest the necessary resources to plan a comprehensive programme of activity that delivers the outcomes set out in this strategy. We will work with customers of individual services on a case-by-case basis to plan in detail how access can be improved and simplified.

The following key workstreams will form the **building blocks** for this programme of work:

**Customer Insight:** using feedback and direct customer involvement to identify the different needs of different groups of customers and organise routes into the service appropriately. More focussed collaboration and communication will be needed to determine where the use of online (or assisted) self-service access points can be used to increase efficiency and reduce cost.



**Service Redesign:** re-designing service delivery routes on the basis of a better understanding of customer experience in order to reduce avoidable and repeat contact as well as duplication and administration across the council.

**Channel Management:** determining, on the basis of customer insight, how services will be organised and delivered across all the access points or channels into the council, including face-to-face, telephone, email, Internet, mobile/social technology (including SMS text messaging, social media, 'apps' and mobile web) and post. Channel Management Plans will be developed for each means of access.

**Information and Technology:** the role of information and technology in supporting delivery of this customer contact strategy is crucial. We will invest in newer technologies to support the delivery of new channels, including online information and transactions, automated telephony (interactive voice recognition) and systems to enable e-bookings and e-payments as well as the tracking of service requests, applications and other documents.

**Performance Management Framework:** in order to review and improve service delivery and ensure that customer needs have been identified and met.

**Business Change and Training:** to ensure we have the skills and capacity to ensure the customer is central to what we do. Specific training programmes will be developed will ensure staff are supported through business change and appropriately trained to deliver the changes implemented.

## Next steps

This strategy has set out the overarching objectives and principles that will guide and shape the way we adjust and improve the accessibility of our services. Some detailed work will now be needed to plan in detail how we deliver the ambitions set out in this strategy, and, importantly, how we ensure those who use and rely on services are involved in this process.

We will begin by planning how we will communicate our ambition and engage service users more widely in the process of action planning for particular services. We will also undertake more detailed research to better understand how different groups (or 'segments' as they are often called) of customers access different types of services. This will help us prioritise what changes will be most effective most quickly, across which access channels and in which service areas. We will develop a channel management plan that sets out how we plan to make best use of each of the different access channels (e-mail, post, web, telephone, etc) that are available.

We will work initially with those services that are most relevant to the majority of residents (known as 'high volume' services), planning in detail on a case-by-case basis new and revised ways of access that are appropriate and relevant to those services and those who use them. We know that if we are to succeed it is absolutely critical that this design work is informed and guided by service users, and led by staff within the services who best



understand customer needs. Importantly, where significant changes are to be introduced, we will undertake Equalities Assessments to ensure that we pay proper regard to our duties in these areas. We will also be piloting a newly developed Privacy Impact Assessment for the overarching programme to ensure that we meet our duties in relation to the management of sensitive data.

Working in parallel with the planning and design activity we set out above, we will procure and implement the necessary technical infrastructure (new systems and hardware) and supporting processes to enable the new ways of working that this strategy involves.

In the longer term, we will develop a performance management framework, and an evaluation plan so that we can review our efforts and know exactly what has been achieved. This will inform future phases of the programme beyond the first two-year plan.

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## Customer Access Strategies

The following strategies are designed to support the overarching Customer Contact strategy. They set out in more detail how we will work to:

- Reduce avoidable contact (Avoidable Contact Strategy);
- Work with customers to shift services to more cost-effective access channels where appropriate (Channel Shift Strategy);
- Reduce the potential for some service users who don't have access to digital technology (the internet, for example) to be excluded from services (Digital Inclusion Strategy); and
- Ensure our services are accessible to all (Accessibility Strategy).

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## **Avoidable Contact Strategy**

### **Our Vision for Avoidable Contact**

***“To reduce the need for our customers to contact us multiple times for a straightforward enquiry”***

### **Why Should we Minimise Avoidable Contact?**

The customer experience for both citizens and businesses when contacting their local council should be one which is responsive, timely and efficient. However, both local authorities and their customers also have limited resources and want to interact as efficiently as possible.

By identifying customer contact that is ‘avoidable’, the council can redesign services to remove unnecessary, valueless contact which is both frustrating for the customer and inefficient for the provider.

We will work with our services and our partners to re-design processes that reduce the need for customers to make contact with the council and its partners multiple times to complete one transaction. For example, notifying a change of address once rather than contacting multiple agencies, paying for school meals by direct debit instead of by cheque each term or chasing up progress on a reported incident or fault.

### **The Key Actions That We Will Take To Reduce Unnecessary Contact**

1. Analyse service data from our main customer access channels and work with specific 'high customer volume' services to look for opportunities to reduce the need for customers to make unnecessary or multiple contact with the council
2. Increase the number of customer queries that we are able to resolve first time on the telephone by redesigning our services
3. Proactively report on service status to customers

## **Channel Shift Strategy**

### **Our Vision for Channel Shift**

***“To design cost effective, efficient and user friendly means of contacting the council and then encourage our customers to use the channels that are most effective”***

### **What is Channel Shift?**

Channel Shift is the process by which organisations seek to encourage customers to access, or interact with, services via channels other than those to which they currently choose – usually because they are more efficient to run.

We will work with customers to understand where channel shift is appropriate and beneficial. Through excellent communication we will encourage customers to shift to new and more effective channels.

### **The Key Actions That We Will Take To Create Channel Shift**

1. Ensure that information relating to a service is available through all relevant channels so that there is no disadvantage to a customer through using alternative means of contact.
2. Provide status updates for any transactions that are started on the web but cannot be completed online – for example reporting a fault – to ensure that if a customer chooses to use the web they can continue to do so without having to resort to additional means of contacts in order to finalise their transaction.
3. All generic services including information services will be designed around the user for 24/7 mobile web access first wherever possible

## Digital Inclusion Strategy

### Our Vision for Digital Inclusion

***“To ensure that customers who do not have access to digital channels at home or work are not disadvantaged when communicating with the council”***

### What is Digital Inclusion?

Over 40% of the UK population does not access public services online. This is often because they don't have access to digital services; often this digitally excluded group includes socially excluded and hard to reach groups who are likely to have the greatest need for public services.

Digital access also matters for the delivery of efficient public services, because when people cannot access services online they invariably access them via alternative means which are generally more expensive. It is therefore important that this strategy includes plans for engaging these hard to reach groups.

The priorities set out in the Digital Britain report reinforce the importance of digital inclusion. The report sets out the Government's plans to drive digital participation and reiterates the Government's commitment to ensuring that public services online are designed for ease of use by the widest range of citizens (refer to the new gov.uk website)

### The Key Actions That We Will Take To Reduce Digital Exclusion

1. Continue to provide public internet access at our key locations, e.g. Libraries.
2. Provide full mediated (assisted self service) access to our website for the public in our contact centre
3. Widely advertise our full choice of contact channels, particularly to hard to reach groups, e.g. transient and socially excluded groups and provide "outreach" services wherever possible.

## Accessibility Strategy

### Our Vision for Accessibility

***“To provide an appropriate range of contact channels for each of our services, with some channels providing enhanced access for customers with special requirements.”***

### What is an ‘Accessibility of Contact’ Strategy?

In the context of this document, accessibility of contact refers to the ease or difficulty that a customer may experience whilst using different access channels to obtain services from the council. For example, someone with hearing difficulties may find the telephone unusable and may prefer to communicate through email. Equally a customer who is disabled may have limited opportunity to visit the council for specific face-to-face services and may need services to be delivered at their home either by mobile visiting teams or via tele-support (i.e. online video conferencing).

We will specifically develop **assisted digital** services to support and encourage our customers to use more cost effective online access channels.

An overall initial **equality analysis** will be undertaken for the programme and services will deliver specific detailed EIAs for significant changes to how customers access services.

### The Key Actions to Provide Efficient and Effective Access to Services

1. Continually engage with groups representing those with specific requirements for the way they contact us and ensure that an appropriate choice of channels is available to those individuals
2. Ensure that we widely advertise our choice of contact channels, particularly to hard to reach groups, for example young people or vision impaired customers

## Glossary

**Apps** – computer software specifically designed for mobile phones, particularly Smartphones. They enable the phone to work like a mini computer. There are an increasing number of apps available for a whole range of functions e.g. games, rail timetables, maps, news, etc. Many apps are available free of charge.

**Assisted Digital** – assists customers who do not have access to digital channels at home or work to communicate with the council with support from trained staff at existing public offices and other associated sites with Internet access. Assisted digital can be provided through phone and web channels.

**Channel** – A means of communication by which a service is delivered or accessed. Examples of direct channels used by the public sector include post, telephone, mobile telephone, web, digital television, kiosks and face-to-face (services delivered in physical locations, such as JobCentrePlus).

**Channel preferences** – the preferences that customers have in terms of contacting and doing business with the council, for example, by phone, by e-mail, etc.

**Channel shift** – Channel shift is when somebody stops using one channel, for example telephone, and uses another one, such as online. The aim is to design cost effective, efficient and user-friendly means of contacting the council and then encourage customers to use the channels that work best for them. Channel shift may involve a customer being directed to the website in future to access information or complete a transaction with the council, rather than ringing the contact centre or visiting Merton Link.

**Channel strategy** – An organisation's plan for the channels it will use to deliver services to its customers. A channel strategy explains how an organisation will meet the demands of its customers using the resources it has available.

**Cost per channel** – the estimated cost of dealing with a customer contact for each different channel (face-to-face, phone, letter, e-mail, online).

**Customer** – A person, business or other organisation using/interacting with a public service. The person could be using the service for personal reasons (e.g. registering the birth of a child, finding out information), for business reasons (e.g. paying business rates), either for themselves or on behalf of someone else.

**Customer insight software** – computer software that can analyse information about customers in order to try and understand their behaviours and preferences e.g. analysing what they buy in order to target sales. In a local authority context, customer insight software has been used to profile key customer characteristics e.g. their preferences for doing business with organisations, or to target actions at specific groups of customers rather than universally.

**Customer relationship management (CRM)** – the main component of a CRM solution is a single customer database, allowing information to be collected once but used many times to build up information on customers and use that information to provide customers with services relevant to them.

**Digital inclusion** - ensuring that the increasing use of digital technology does not exclude certain customers from properly accessing services they need.

**Failure demand (avoidable contact)** - is demand for a service when an organisation fails to do what the customer expects, or fails to do something how, or when, the customer expects it. This failure results in avoidable contact, including duplicate contact with the organisation on the same matter. Failure demand can be addressed by reducing the need for customers to contact the council.

**Geodemographic segmentation** – segmenting the population by recognising that people generally live in close proximity to other people who are demographically similar. The demographic profile is typically based on age, income/wealth, family size, lifestyle.

**Insight** – An insight into a customer is a deep truth based on an understanding of customer behaviour, experiences and attitudes, and their needs from a service. Organisations with insight into their customers can deliver the services their customers need, through the right channels.

**Online transactions** – Customers are able to undertake transactions independently online using an automated e-form linked to back office systems, or via an automated payments system. An example of an online transaction is renewing a parking permit or paying a council tax bill.

**Open Data** – data that is accessible (ideally via the internet), in a digital, machine readable format and that is free of restriction on use or redistribution.

**Self-Serve** – customers can carry out transactions with the council themselves, without the need for a member of staff to do anything. This may be by doing something online, for example, completing a form to request a service, or doing something using automated telephony. Payments can be self-service, as can using self-service access points in the face to face contact centre (Merton Link).

**Service delivery** – The process by which a customer receives or accesses a service. Service delivery often involves multiple stages, for example a public sector service delivery process may involve:

- Enquiries and requests for information (e.g. “What benefits am I entitled to?”)
- Service fulfilment (e.g. registering for benefits and payment of benefits to customer)
- Follow-up and after care (e.g. reviewing benefits entitlement after a change in circumstances)
- Public sector service delivery can involve a complex chain of actions across multiple organisations.

**Smartphone** – a type of mobile phone, with more advanced features than a normal mobile phone, e.g. touch screen facility, high speed data access, GPS (Global Positioning System) availability. They enable a user to browse the web, handle email, locate themselves on a map, for example.

**Telephony automation** – push button or voice recognition software is used to reduce the need for a member of staff to answer the phone.

**Transactional e-service** – customers are able to request a service online and receive an update when complete.

**Web portal** – enables a customer to sign-in via the web and access a range of services; it presents information from a number of different places in a single view for the customer therefore making it easier to access those services.

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