



London Borough of Merton

Report and recommendations arising from the scrutiny task group review of customer access

Corporate Capacity Overview and Scrutiny Panel

March 2011

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Acknowledgements

The task group would particularly like to thank all the people who spoke to us and those who took the time to complete our questionnaire in order to share their experience of contacting the Council.

We would also like to thank the officers in Hillingdon, Lewisham and Southwark Councils who gave up their time to tell us about how they have improved their customer services.

We are grateful to the council officers who provided written information and came to meetings to discuss their work with us

All contributors are listed in Appendix 1 and Appendix 2 of this report.

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Foreword by the Chairman of the Task Group

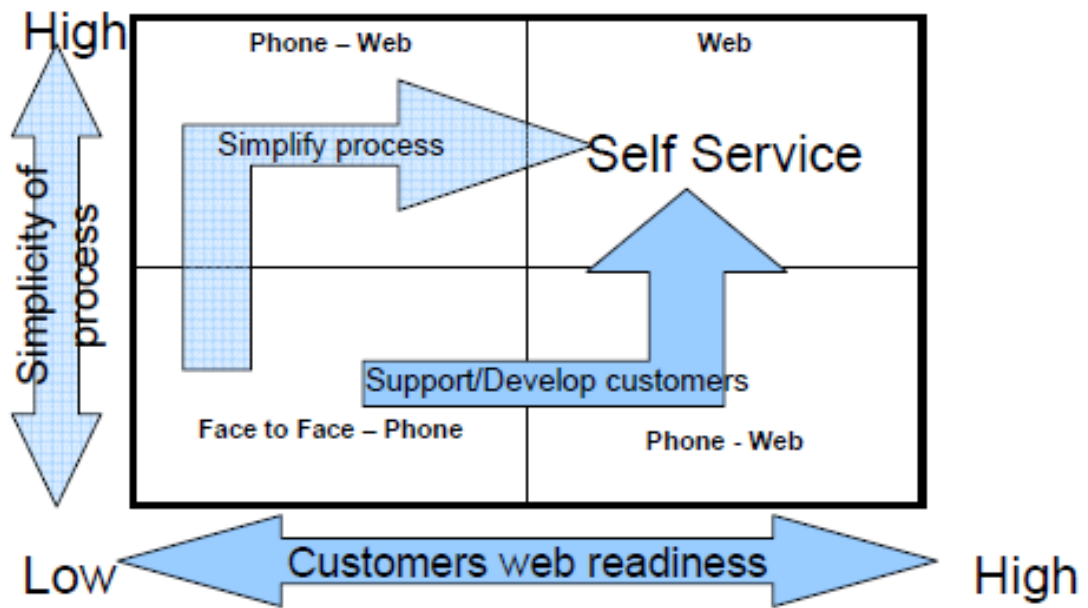
Providing good and prompt access to Council services will always be a challenge. Residents with internet access at home or work expect much more rapid responses to their queries than a decade ago, with many customers preferring to complete as much as possible on-line at times to suit them. Not surprisingly this change is not limited to the younger citizens as more older people become much more interested and capable of handling email, the web and even Skype.

Clearly the Council will never be able to shift everyone to internet access; some residents prefer personal interactions, either face-to-face or telephone. A substantial minority, as evidenced by our exit surveys' from the Merton Link, would not be able to handle internet access even if offered to them at libraries or elsewhere, without officer assistance. Consequently nothing in our recommendations suggests ceasing telephone or face-to-face access to our customers. The existing call-centre is an excellent approach to consolidate customers' queries and requests into an ever improving knowledge base in Sean Cunniffe's Customer Access team.

We recommend that the Council considers adopting one single external telephone number for all customer contacts, including the general switchboard with automated redirects when extensions are known and redirect to specific customer issues such as waste or housing benefits to allow the call centre to allocate calls more efficiently. We understand that everyone hates such automated systems, but they can be effective provided there are not too many layers. In addition we recommend continuing with other key service numbers such as missed waste collection, but that all services eventually get dealt with initially by the call-centre.

Nevertheless by providing customer access via the internet has substantial cost savings for the Council and our clear overarching recommendation is that as many services as practical should be **offered** on the internet. We do not mean just to the opportunity to download forms for printing off and posting back to the Council, but **real web based forms** that capture the data submitted and populate the myriad of databases that the Council uses. This should happen even when a signature is required, for example by the DWP, as this should not negate the benefit from capturing data on-line then asking the claimant to print off, sign and return forms for checking against the on-line applications, or customers booking an appointment and officers printing.

We accept that the more complex the service the more likelihood there is a need for face-to-face or telephone access as can be illustrated in the diagram from LB Lewisham’s “Delivering the Customer Services Strategy” report:



One key recommendation is that web based services should provide a kiosk self-service for customers’ with an initial account creation linking Council Tax/other standard address databases to confirm customers’ addresses and post code and link to any Council Tax accounts. Personal details should be captured once only, including their email address; using a login name of their choice and then link all further services automatically, including at a minimum:

- Adult Self Care
- Bulk Waste Collection booking
- Green Waste Collection bookings
- Missed waste collection
- Council Tax account/payment
- CPZ, Visitor permit purchases/payment & PCNs
- Housing benefits
- Planning
- Appointment bookings to meet with officers for specific services

We liked the “Love Clean Streets” idea whereby anyone can register graffiti; litter and fly-tipping and suggest that this option be added to the front page of the Council’s web page and any home page after customers log onto their accounts.

Touch-screen “I have arrived” system such as Qmatic, to enable customers with pre booked appointments to alert officers they have arrived should be considered.

The Council should move as quickly as possible to providing notice of PAC meetings to Planning Applications objectors and other interested parties rather than relying on the Post.

Customers’ in the service context includes Councillors and we recommend that a single system is identified to handle the recording of and response to councillor enquiries. We would expect the existing customer relationship management system to be considered as an option for doing this. Each Political Group Office should be given access to the system to allow their office staff to log and view issues. As soon as possible the system must be offered to individual councillors to allow them access at a minimum to those issues they have raised.

Not only will this enable Councillors’ to be more efficient, but will save hours of Officers’ time responding to emails and telephone calls. At the very least each Political Group office should be given access to the current CRM software to allow their office staff to log and view issues. As soon as possible a web based solution must be offered to Councillors to allow them access at a minimum to those issues they have raised, if not cross ward matters. Change Management is always painful, but on the longer term this has got to mean more efficiency through less emails/phone calls chasing officers.

Without doubt any web based services will be ineffective without good IT infrastructure, but the Task Group is unclear about Merton’s current systems, which ideally warrant a separate task group review.

The task group team has worked hard trying to understand the Council’s current modus operandi, including standing in the Merton Link to capture exit surveys, listening to officers and others explaining current and planned processes, visiting other Councils to understand their customer access methods. I would like to personally record our thanks to officers from Hillingdon, Lewisham and Lambeth for spending time with the task group; our own officers, especially Chris Pope, Chris Johnston, Sean Cunniffe, Gumel Bansal and of course our hard working Scrutiny Manager, Julia Regan and our Cabinet members. Last but not least I would like to thank the Task Group members, Cllrs John Dehaney, Sam George, Suzanne Grocott and Richard Williams, who all gave their time freely and willingly.

Chris Edge
Chairman Customer Access task Group
LB Merton
28th February 2011

Executive Summary

The task group was set up in order to investigate customer access to council services. In particular, the task group was asked to examine the council's draft customer contact strategy in order to make recommendations that will influence its direction, content and implementation.

The report is evidence based, drawing on and reflecting the wide range of written and oral evidence received. Task group members visited three other London councils in order to find out how they have approached improvements to customer services and what Merton Council could learn from their experience.

Task group members spoke to customers in the reception areas of the civic Centre as well as drawing on views expressed in a telephone survey of contact centre users and by residents through a self completion questionnaire.

The task group endorsed the underlying principles and direction of the draft customer contact strategy to encourage greater use of web-based and telephone services while providing a safety net for those who will need to make contact in person.

The task group have recommended that all customer services should be made available on-line unless there is a robust reason not to. It has also recommended that expansion of the Council's telephone contact centre is evaluated, including the feasibility of providing shared services with other councils.

Other recommendations address the need to advertise the availability of on-line services to residents in order to encourage their use.

The task group has also examined the Council's draft IT Strategy and made comments aimed at ensuring IT strategies and systems are sufficiently robust to support the implementation of the customer contact strategy.

The recommendations are listed in full overleaf.

List of task group's recommendations

| | Responsible decision making body |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Recommendation 1 (paragraph 42) | |
| We recommend that Cabinet identify a Cabinet Member and a Director to have continuing responsibility for the leading the implementation of the Council's customer contact strategy. | Cabinet |
| | |
| Recommendation 2 (paragraph 47) | |
| We recommend that the Channel Strategy is renamed to the Customer Contact Strategy, or some other title that will be meaningful to local residents. | Cabinet |
| | |
| Recommendation 3 (paragraph 50) | |
| We recommend that all appropriate Council services should be made available on-line unless there is a robust reason not to. This migration should begin with services that have the highest volume of transactions. (recommendation 3) | Cabinet |
| | |
| Recommendation 4 (paragraph 53) | |
| We recommend that the Customer Contact Strategy should be supported by an action plan to communicate, using all available channels (including councillors' ward newsletters), the availability of online services and information on the specific services that are available. | Cabinet |
| | |
| Recommendation 5 (paragraph 54) | |
| We recommend that the Customer Contact Strategy and associated action plans should consider ways of making online use the preferred option for customers and ensure that this is communicated clearly in order to encourage uptake. | Cabinet |
| | |
| Recommendation 6 (paragraph 57) | |
| We recommend that the Council implement an interactive online mapping system so that residents can report streetscene issues and investigate how the use of this software could be expanded to include other service requests, such as missed bin collections. | Cabinet |
| | |
| Recommendation 7 (paragraph 60) | |
| We recommend that the Council investigate the costs and benefits of expanding the range of services delivered through the contact centre. This should include an assessment of the feasibility of incorporating the | Cabinet |

| | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| switchboard within the contact centre. | |
| Recommendation 8 (paragraph 61) | |
| We recommend that the Council investigate what economies of scale could be achieved by sharing a call centre with one or more other councils. | Cabinet |
| | |
| Recommendation 9 (paragraph 63) | |
| We recommend that consideration should be given to siting council reception points within other services, such as libraries. | Cabinet |
| | |
| Recommendation 10 (paragraph 64) | |
| We recommend that further thought is given to how to make best use of the reception space on the ground floor of the Civic Centre in order to improve the customer experience. | Cabinet |
| | |
| Recommendation 11 (paragraph 66) | |
| We recommend that Cabinet consider the feasibility of closing the cash office rather than further reducing its opening hours. | Cabinet |
| | |
| Recommendation 12 (paragraph 68) | |
| We recommend that the AllPay facility for paying Council bills is widely promoted through My Merton and other communication channels, including by councillors in their ward newsletters. | Cabinet |
| | |
| Recommendation 13 (paragraph 74) | |
| We recommend that the next draft of the IT Strategy take into account our comments (in paragraphs 66-70 of our report) and make explicit reference to the Customer Contact Strategy. | Cabinet |
| | |
| Recommendation 14 (paragraph 77) | |
| We recommend that a single system is identified to handle the recording of and response to councillor enquiries. We would expect the existing customer relationship management system to be considered as an option for doing this. Each Political Group Office should be given access to the system to allow their office staff to log and view issues. As soon as possible the system must be offered to individual councillors to allow them access at a minimum to those issues they have raised. | Cabinet |

Report of the Customer Access Scrutiny Task Group

Introduction

Purpose

1. The Corporate Capacity Overview and Scrutiny Panel, at its meeting on 20 July 2010, agreed to set up a scrutiny task group to investigate customer access to Council services.
2. The Panel appointed a small working group of councillors to carry out this work and report back to the Panel's meeting on 30 March 2011.
3. The task group's terms of reference were:
 - to examine the scope, aims and principles of the Council's draft customer contact strategy
 - to assist in the development of the customer contact strategy by taking a customer perspective and making recommendations that will influence its content and direction
 - to advise on implementation of the strategy, taking into account current pressures relating to IT, finance and other resources.

What the task group did

4. The task group has had seven meetings at which a wide range of evidence has been considered including the Council's draft customer contact strategy (Channel Strategy) and draft IT Strategy. The task group has also examined data on the volume and type of customer contacts.
5. Task group members visited the London boroughs of Hillingdon, Lewisham and Southwark in order to talk to officers about their experiences of progressing service transformation and improved customer access to services.
6. The task group heard from almost 200 residents:
 - Task group members interviewed 58 customers in the reception areas in Merton Link
 - Contact Centre staff carried out a brief telephone interview with 136 callers
 - 103 residents replied to a self-completion questionnaire that was placed on the Council's website and sent to residents associations and to individual residents on the community forum mailing lists.
7. This report sets out the task group's findings, conclusions and recommendations. The task group's recommendations run throughout the report and are set out in full in the Executive Summary at the front of this document.
8. Appendix 1 lists the written evidence received by the task group and Appendix 2 lists the witnesses at each meeting.

Customer contact – the current situation

9. Customers currently contact the Council in a variety of different ways – by visiting, phoning, writing, emailing and using the Council’s website.

Visits

10. The main reception service for the Council is provided on the ground floor of the Civic Centre in Morden, dealing with around 110,000 visitors per year. This comprises a general reception, the planning service reception and the cash office. The main service enquiries dealt with by the general reception (Merton Link) are housing benefits, council tax and housing needs as well as a wide range of miscellaneous enquiries.
11. We talked to 58 people who visited Merton Link on two mornings in November 2010. We found that they value the personal contact provided and consider a visit to be the most appropriate way of dealing with complex enquiries (particularly on housing benefits) and for dealing with several matters at one time. Many of the people we spoke to were not keen on using the internet even though some have access to a computer at home.

Phone

12. The Council receives calls on multiple phone numbers. All the individual service numbers together receive more than a million calls a year. The switchboard handles over 250,000 calls a year, generally passing enquiries on to other services throughout the organisation. The Contact Centre handles around 320,000 calls a year mainly on behalf of street scene enquiries (refuse and recycling) but also for school admissions, an assisted payment line and Merton Adult Education.
13. The Contact Centre exit interviews revealed a preference for using the phone to contact the Council – as with visits, the personal contact was valued. When asked why they had used the Contact Centre rather than an online service or information, many callers expressed some reluctance to use a computer saying that it is quicker to phone than to turn their computer on and wait for the internet to load. Other reasons given for calling were previous service failure (such as missed bulk waste collection that had been booked online) and lack of online availability for the matter in question.

Online

14. We were told that Merton Council has been an early adopter of on-line transactions and use of customer relationship management systems (a database that holds customer and other information and links to other IT systems) and is one of the few Council websites to be classified as “transactional”.
15. Some transactions can be completed totally online – for example payment of Council bills – and these are known as “truly transactional”. Others require a form to be downloaded, printed, completed and posted

to the Council. We understand that 87 truly transactional services are currently available on-line, together with over 100 information services.

16. We heard that although the council has a customer relationship management [CRM] system there are a number of different service specific databases in use and there are currently variations in how names and addresses are entered and stored and they can't be matched up at present. We understand that this situation will be addressed over the next few years by consolidating customer data bases via the CRM.
17. We welcome the intention of the IT Strategy to reduce down to 30 strategic IT systems, which would represent a major reduction on the 100+ in use at present.

Customer satisfaction

18. There are two questions in the annual residents survey that relate directly to customer care:
 - whether staff are friendly and polite
 - whether the Council is difficult to contact by phone
19. We note the year on year reduction in the proportion of residents who perceive the council as difficult to contact by phone. We also note that on both of these measures Merton has been above the London average in recent years, with a slight dip below the London average on staff attitude in 2010:

| | London 2010 | Merton 2010 | Merton 2009 | Merton 2008 |
|------------------------------------------------|----------------|----------------|----------------|----------------|
| agree staff are friendly and polite | 76% | 75% | 78% | 75% |
| agree council is difficult to contact by phone | 40% | 33% | 37% | 44% |
| | | | | |

What is happening elsewhere?

20. We are very grateful to officers in Hillingdon, Lewisham and Southwark Councils for taking the time to talk to us about their approach to improving customer services so that we can learn from their experience

Hillingdon

21. Hillingdon Council has an award winning contact centre that currently provides the main point of contact for 27 services and plans to expand to 50 plus. We heard that a key feature is the use of multi-skilled staff who can deal with almost all enquiries relating to Council services, including complex ones such as adult social care, without having to pass them on to the back office. This frees up specialist staff, such as social workers, for work that only be done by those with professional training.
22. The contact centre has reduced costs by using fewer staff (90 back office staff have been replaced by 58 in the contact centre) and has improved customer service by being able to deal with enquiries immediately and reducing the time taken to process service requests – for example processing blue badge applications has been reduced by 10 days.
23. Contact centre work is underpinned by use of a customer relationship management system that enables staff to process enquiries and service requests quickly and efficiently. The Council is about to launch 18 fully automated transactions.
24. We were impressed by the use of “greeters” in the Council’s reception area who direct customers to the appropriate reception desk.
25. Learning points:
 - changing customer behaviour to encourage them to move from one method of accessing services to another takes a long time.
 - on line services get out-of-date very quickly unless the service owns the data and there is a named individual with responsibility for keeping it up-to-date

Southwark

26. Southwark Council has a five year improvement plan for customer service that includes plans to provide services “right first time” , to increase the proportion of customer interaction on-line and to make the on-line service truly transactional so that customers get a faster response and less work is created for staff in back offices.
27. The council invested in a new website 12 months ago which will enable customers to have an on-line account. A mapping system is currently used whereby residents can click on a map to report fly tipping or an abandoned vehicle.
28. The Council is considering ways of encouraging on-line use, including making other methods slower and therefore less attractive, such as

making people wait longer if they want to use the call centre and closing down some of the alternatives. For example, in future residents will only be able to apply for a parking permit online or over the phone and the parking shop will be closed.

29. Southwark Council analysed the pattern of customer interaction and found that 8 times more people visited libraries than other council buildings. This analysis led to plans to include a customer contact point (possibly an assisted self service facility) in a new library which will be opened next year. Southwark is looking at the possibility of closing its 3 OSS and instead expand the customer offer in all of its libraries.
30. A “one touch” phone system has been developed that delivers 10+ services to new residents through one phone call. They are considering a similar service for new council tenancies as Southwark has a large number of council tenants.
31. Learning points:
 - customer relationship management systems only work if sufficient information is entered by back office services
 - once a service is truly transactional there is a large increase in the proportion of customers using the online facility
 - advertising on-line facilities is effective - when Southwark Council sends out renewal letters for parking permits they include information and a PIN number to encourage people to renew on-line.

Lewisham

32. Lewisham Council has invested almost £5million to support the implementation of its customer services strategy 2007-2010. They expect to achieve £8million in cashable efficiency savings over a ten year period.
33. The customer services strategy aimed to maximise the use of the call centre and a truly transactional website, keeping face to face contact for those who really need it. Experian data was used to work out where to locate three walk in centres to meet these needs.
34. The driving principle for change has been putting the customer first. For example, the complex housing benefit application form used to result in 4.5 customer contacts from first visit to first payment. The form is now only available on-line and customers have to book an appointment so that a member of staff can fill it in with the customer (assisted completion). Now 60% of new claims are placed into payment on day one.
35. Lewisham’s 150 seat call centre includes the Council’s switchboard number plus 5-6 other “golden” phone lines, including environment and adult social care.

36. The customer relationship management system has been invaluable. We were impressed by “Love Lewisham”, an interactive mapping system developed in partnership with London Councils, that enables residents to take a photo of problems on the street, upload it to report the problem and then the council operative takes and uploads a photo once the job has been completed.
37. The Council has pursued ways of encouraging customers to use the website (self-serve) or phone rather than visit the Council, for example, they are about to have a pilot period during which the council tax service will be available by phone and online only.
38. We were interested to hear about Lewisham Council’s use of pre pay cards instead of cheques or cash for particular client groups such as care leavers in order to help them learn budgeting skills and to reduce the use of the cash office.
39. Learning points
 - improving customer access is best done within wider context of service transformation and technological support
 - tailoring service to customer at an early stage in the transformation process saves money in long term
 - start with high volume services
 - involve customers and staff in the process
 - do not forget the importance of cultural and behavioural change

Developing a customer contact strategy for Merton

General comments

40. Improving customer access and customer service are key components to the overall improvement of Council services. We want customers to have a positive experience when they contact the council and we want resources to be used effectively and efficiently to meet customer need. Getting customer service “right first time” is not only good for the customer, it is good for the council.
41. We understand that there is potential to make significant cost savings by migrating a proportion of contacts away from face-to-face and phone towards electronic (web-based) communication methods. We endorse this direction of travel and propose that there is clear leadership and ownership of this work.
42. **We recommend that Cabinet identify a specific Cabinet Member and a Director to have continuing responsibility for the leading the implementation of the Council’s customer contact strategy. (recommendation 1)**
43. We acknowledge that not everyone can or wants to use computers to access council services and so alternatives, including mediated web-access, will need to be provided. Mediated web access is where a council officer completes an on-line jointly with or on behalf of the customer – this is how Lewisham Council deal with the housing benefit application form.
44. We heard that the council’s customer contact strategy will seek to:
 - minimise use of the call centre and reception services
 - review balance between front office and back office for service delivery
 - strengthen and increase number of web enabled services
 - consider how and where face to face contacts should be made, linked to the Council’s property strategy.
45. We have examined the first draft of the Council’s customer contact strategy, currently known as the Channel Strategy. We believe that the word “channel” is not meaningful to the public.
46. We note that other councils have chosen more meaningful titles for this strategy, such as the customer contact strategy or customer access strategy. Rotherham Council calls its strategy “Customer Access in Rotherham. Vision and Strategy 2008-2011” and Shepway District Council’s strategy is “making it easy to do business with the council”.
47. **We therefore recommend that the Channel Strategy is renamed to the Customer Contact Strategy, or some other title that will be meaningful to local residents. (recommendation 2)**

Moving towards web-based service provision

48. We agree that moving as many services as possible to the web is the right approach as long as a safety net is provided for those who need to make contact in person. There is clear evidence from other councils that reduced costs can be made through the on-line self service model, particularly for those services with a high volume of transactions.
49. We believe that all services should be offered on line – this would include services as diverse as bulky waste collection, wedding bookings, community centre bookings, insurance claims, licensing applications and consultations (particularly planning and environmental consultations). Innovations such as having “print your own” barcoded parking permits should be encouraged.
- 50. We recommend that all appropriate Council services should be made available on-line unless there is a robust reason not to. This migration should begin with services that have the highest volume of transactions. (recommendation 3)**
51. We believe that the shift to online services should be achieved through encouragement and incentives rather than penalising residents who use other channels. Incentives could include:
 - faster service delivery – e.g. waste collection offered within a shorter timeframe if booked online
 - a single log on (customer account) to make a wide range of services easily accessible
 - a discount on the council tax bill for people who sign up to an online account
52. We welcome the initiative taken by the Housing Benefits service to train local housing association staff in the use of the on-line benefit application form so that they can help their customers to apply online, thus improving uptake.
- 53. We recommend that the Customer Contact Strategy should be supported by an action plan to communicate, using all available channels (including councillors’ ward newsletters), the availability of online services and information on the specific services that are available. (recommendation 4)**
- 54. We further recommend that the Customer Contact Strategy and associated action plans should consider ways of making online use the preferred option for customers and ensure that this is communicated clearly in order to encourage uptake. (recommendation 5)**
55. Until such time as the government stops the requirement for a paper copy of Council Tax bills to be sent to residents, we urge the Council to look for alternative modes of communication wherever possible.

56. We were very interested in the use of mapping software so that residents can report “streetscene” issues such as graffiti or abandoned cars by locating the site on a map. Lewisham’s website enables residents to check if the issue has already been reported and to track the council’s progress with resolving it. <http://www.lovelewisham.org/>.
- 57. We recommend that the Council implement an interactive online mapping system so that residents can report streetscene issues and investigate how the use of this software could be expanded to include other service requests, such as missed bin collections. (recommendation 6)**

Phoning the Council

58. We are convinced of the need for the Council to continue to have a telephone contact centre. Based on evidence from other councils, it is clear that an expanded contact centre has the potential to offer a faster and more responsive service to our customers and to enable the council to make further savings in back office functions.
59. We believe that the contact centre should include a greater number of services (including the switchboard) and a single phone number that is memorable and starts with a local exchange number. Callers should be greeted with an automated message with number options that lead to a person rather than further automated options.
- 60. We therefore recommend that the Council investigate the costs and benefits of expanding the contact centre. This should include an assessment of the feasibility of incorporating the switchboard within the contact centre. (recommendation 7)**
- 61. We further recommend that the Council investigate what economies of scale could be achieved by sharing a call centre with one or more other councils. (recommendation 8)**

Reception services

62. We are convinced of the need for the council to retain reception services so that those customers who need a personal face-to-face service can continue to receive it. Careful consideration should be given to the where the service (or service points) should be located. This should take into account where the people who are most likely to use the service live, what service requests are likely to be received and which staff are best placed to respond to them.
- 63. We recommend that consideration should be given to siting council reception points within other services, such as libraries. (recommendation 9)**

64. We recognise that the reception area in the Council's main building will continue to be an important service for residents. **We therefore recommend that further thought is given to how to make best use of the reception space on the ground floor of the Civic Centre in order to improve the customer experience. (recommendation 10)**
65. We discussed the use of the cash office and its opening hours and agreed that "the majority of the task group recommend closing, rather than reducing, the cash office opening hours".
66. **We therefore recommend that Cabinet consider the feasibility of closing the cash office rather than further reducing its opening hours. (recommendation 11)**
67. We would like to encourage cash office customers to pay on-line or to use the PayPoint (AllPay which is in newsagents and other shops around the borough).
68. **We recommend that the AllPay facility for paying Council bills is widely promoted through My Merton and other communication channels, including by councillors in their ward newsletters. (recommendation 12)**

Merton Council's IT Strategy

General comments

69. We were pleased that an early draft of the IT Strategy was shared with us so that we could understand the thrust of the strategy and its relationship to the customer contact strategy. We would like to see explicit links between the two made in both documents.
70. We welcome the support that the IT Strategy will give to improving customer access to online services. In particular we welcome the proposals for multi-language support, single point of access, self service and secure payments. We were pleased to read that a single customer sign on will be in place in 2011/12.
71. Some of the residents we have heard from have found the service they wished to access on the Council's website out of action at the time they needed it. We therefore need to ensure that our IT systems are sufficiently robust to cope with a wider range and higher volume of traffic in future.
72. We believe that IT should have a higher profile within the organisation, subject to the availability of financial resources. We wish to encourage shared IT services with other councils, subject to evaluation of the potential for this approach to achieve value for money.
73. We would also like to see a business continuity plan for IT included within the IT Strategy.
74. **We recommend that the next draft of the IT Strategy take into account our comments (in paragraphs 66-70 above) and make explicit reference to the Customer Contact Strategy. (recommendation 13).**

Customer relationship management systems

75. We welcome proposals for a single customer relationship management (CRM) system and wish to encourage CRM being brought up to a level where web-based access is possible. We were pleased to hear that an action plan is in place to upgrade it in due course and that this would provide scope for some interesting changes to service delivery.
76. We would like councillors to be given access to the CRM or a similar system so that we can monitor progress on the enquiries that we make on behalf of residents. This would not only enable us to be more efficient, but would also save hours of officers' time in responding to emails and telephone calls from councillors.
77. **We recommend that a single system is identified to handle the recording of and response to councillor enquiries. We would expect the existing customer relationship management system to be considered as an option for doing this. Each Political Group Office**

should be given access to the system to allow their office staff to log and view issues. As soon as possible the system must be offered to individual councillors to allow them access at a minimum to those issues they have raised. (recommendation 14).

Concluding remarks

78. We have carefully examined the underlying assumptions of the Council's draft customer contact strategy, taking into account the experiences of other councils and the views of our local residents.
79. We have concluded that the strategy is headed in the right direction. We endorse the dual aims to reduce costs and improve services for customers. We support the intention to expand the provision of on-line services and to encourage residents to use these.
80. Our recommendations are aimed at supporting and strengthening the strategy so that all services will be offered on-line in future unless there is a robust reason not to. We believe that there is scope to expand the range of services provided by the Council's telephone contact centre and have recommended that this is investigated further.
81. We acknowledge that some residents will need to contact the Council in person and it is important that they will be able to do so. We have recommended that the existing reception areas in the Civic Centre is reviewed to improve the customer experience. We have also recommend that consideration is given to locating reception points within other services, such as libraries.
82. We hope that the Corporate Capacity Overview and Scrutiny Panel will keep an eye on the implementation of the strategy to make sure that these objectives are achieved. We will want to see clear evidence of significant improvement during the next year.

What happens next?

83. This task group was established by the Council's Corporate Capacity Overview and Scrutiny Panel and so this report will be presented to its meeting on 30 March 2011 for the Panel's approval.
84. The Panel will then send the report to the Council's Cabinet on 20 June 2011 for initial discussion.
85. The Cabinet will be asked to provide a formal response to the Panel within two months.
86. The Cabinet will be asked to respond to each of the task group's recommendations, setting out whether the recommendation is accepted and how and when it will be implemented. If the Cabinet is unable to support and implement some of the recommendations, then it is expected that clearly stated reasons will be provided for each.
87. The lead Cabinet Member (or officer to whom this work is delegated) should ensure that other organisations to whom recommendations have been directed are contacted and that their response to those recommendations is included in the report.
88. A further report will be sought by the Panel six months after the Cabinet response has been received, giving an update on progress with implementation of the recommendations.

Appendices

Appendix 1: written evidence

Channel Strategy, draft May 2010, LB Merton

2009 Annual Residents Survey

Analysis of Contact Centre service requests 2009/10

Slides from Capital Ambition event on online services, 30 September 2009

Achieving more with less – Merton Efficiency Project – customer contact business case, Deloitte, April 2009

A3 Diagram showing channels of communication into Merton

Overview of customer access channels, briefing paper, October 2010, Sean Cunniffe, Customer Access & Strategy Manager, LB Merton

Analysis of telephone data, April 2010 to date, LB Merton

Analysis of online readiness of each service area, Oct 2010, LB Merton

Draft IT Strategy, December 2010, LB Merton

Council's CRM interconnections diagram, December 2010, LB Merton

Appendix 2: list of oral evidence

Chris Pope, Director of Transformation, 2 August, 29 September, 26 October 2010 and 16 February 2011

Chris Johnson, Head of Audit and Support and Customer Services, 2 August and 26 October 2010

Gurmel Bansal, Head of IT, 29 September 2010

Sean Cunniffe, Customer Access and Strategy Manager, 26 October 2010

Yvonne Salvin, Client Manager, Southwark Council, 9 November 2010 (visit)

Fran Beasley, Deputy Chief Executive and Steve Palmer, Head of ICT and Business Services (also President of SOCITIM), Hillingdon Council, 16 November 2010 (visit)

Peter Gadsdon, Head of Strategy and Performance and Lindsey Grant, Policy & Strategy Officer, Directorate of Customer Services, Lewisham Council, 14 December 2010 (visit)

Councillor Mark Betteridge, Deputy Leader and Cabinet Member for Performance and Implementation, 16 February 2011