



Customer Access Strategy 2019-2022

1 | Introduction

In 2017-2018 the Customer Service Team received around 165,000 calls, supported 43,000 visitors and responded to approximately 31,000 emails.

For a number of years, the Council has been making it easier for our customers to get in touch with us. With more people than ever accessing online services, the Council has committed to investing in ways to improve the services our customers receive, whether that's an application for a parking permit or support with their business, we want to make the process better.

In our strategy we recognise that not everyone will want to use online or telephone services and we have a team of staff to help people when they need it. One size definitely doesn't fit all but no matter how our customers get in touch with us, or which service they use, they should expect the same standards every time.

We are very excited at what the future holds. 2019 marks the start of our history as a West Suffolk Council. With this comes an opportunity to set out our plan for the next few years and our ambition to keep improving the customer experience and using new technology to make things easier and better for all. Crucial to this is to understand more about customer demand and expectation as well as appreciating how technology can be used to integrate services within the council and with our partners.

2 | The strategy and how it supports the Council's ambitions

This strategy outlines how we will provide access to our services. This strategy supports the delivery of the Council's Strategic Framework and in particular, the 'ways of working' that, when taken together, represent a set of distinctive features of our organisation. These ways of working govern the way in which we carry out our business and choose to progress which opportunities are important to pursue.

"The West Suffolk Way"

Empowering families and communities to create positive and healthy futures. Working in a way which helps to create safe places, recognises individuals and their needs and strengths, understands relationships and connects people. Finding out what communities care about and supporting them to achieve their goals.

Place focus and subsidiarity

Distinctively local, not generic solutions that are shaped and delivered locally and reflect the different challenges and opportunities of West Suffolk's towns, villages and countryside areas.

Collaboration and integration

Ambitious and comprehensive cross-system partnerships that join up resources around communities and individuals.

Inclusive growth

Encouraging and investing in ambitious growth and good quality housing that all can access and benefit from, and that is good for local people and the environment.

Financial self-sufficiency

A shift from reliance on grants to self-generated income, returns on investment, and business rates growth.

Behaving more commercially

Taking a business approach to our operations, within our public service remit.

Digitally enabled

Maximising the potential of data and technology to transform decisions and transactions

This strategy is also linked to the themes contained within the council's Medium Term Financial Strategy:

1 | Aligning resources to the West Suffolk strategic plan and essential services;

2 | Continuation of the shared service agenda and transformation of service delivery;

3 | Behaving more commercially;

4 | Considering new funding models (eg acting as an investor);

5 | Encouraging the use of digital forms for customer access; and

6 | Taking advantage of new forms of local government finance (eg business rate retention).

All the while supporting our ambition under the 'Improving how we work' principle within the Strategic Framework:

Improving how we work

Supporting our ambitious agenda of enabling change in our local communities requires us to 'lead by doing' and is reliant on significant supporting infrastructure, for example around communications, policy development, information management, estate and resource management, customer access, workforce and organisational development and improving our governance and democratic arrangements

How we work with our colleagues to support our customers is integral to the way we have designed the council's structure and the delivery of our Target Operating Model.

3 | Target operating model

In 2014, the adoption of the Councils' Target Operating Model (TOM) for Customer Services (see Diagram 1 overleaf), marked a fundamental change to the delivery of the Customer Services function across both Councils. It was designed to ensure that we simplify our processes and ensure that customers could find the information they needed quickly and easily. The TOM's simplicity of approach has stood the test of time; technology and customer expectations have changed but the TOM has kept pace and continues to be the model of choice for the next three years.

Providing information

We will ensure that information is provided online and that the customer knows where and how they can access this information at a time which suits them. We will continue with our ongoing improvement work to ensure that our systems and processes are as simple and easy to understand as possible.

Self-serve

We will provide self-serve options for customers where possible, to make it even easier for customers to report or resolve their issue or pay for a service online.

Triage (understand, resolve or refer)

For those customers who are unable to self-serve, or who would prefer to speak to someone about their issue, we have in place knowledgeable customer service staff who have the skills to answer all but the most complex enquiries. This is commonly referred to as 'triage' as staff will be trained to understand the best and quickest route to ensure that customers' queries are dealt with effectively. On many occasions

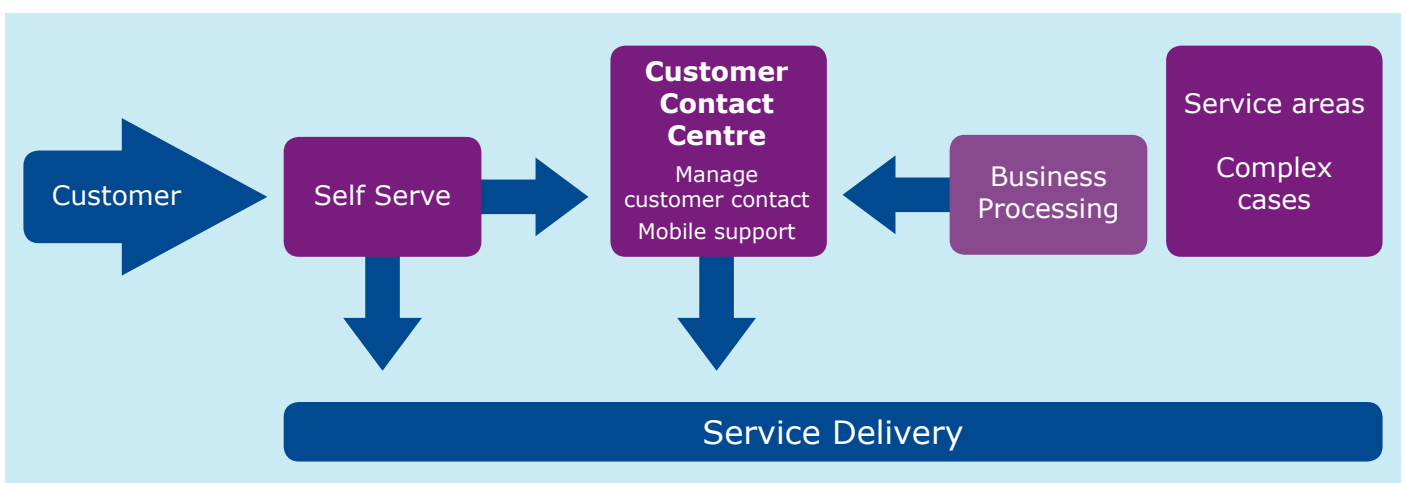
customers may make contact with a council with more than one enquiry, in these circumstances the customer service staff should be able to answer as many of these as possible at the first point of contact. Complex and/or crisis management issues are passed quickly to staff with the relevant expertise

Service processing

The customer service team includes staff who are trained to give advice on technical enquiries and/or process applications or paperwork for that service area e.g. building control or licensing.

Crisis or complex case management
If the customer enquiry is too complex for the customer services team to answer, then the enquiry would be quickly passed onto the service area to manage. This includes crisis management which requires expert support, for example, where someone requires help because they have become homeless. The expert staff also provide the specialist support to customer service and administration staff.

Diagram 1: Our customer access target operating model



4| Changes in customer contact with the Customer Service team since 2012

With the aim of achieving a 20% channel shift from direct contact to online channels and self-serve methods (amounting to around 85,000 contacts), the data captured in November 2012 has been used to provide the baseline in Table 1 below. The figures below only relate to the transactions managed by the Customer Service, for example, they exclude direct dial phone calls. The online forms do not include a number of transactions which move online through the use of 'external' council system, particularly, Planning Portal, Home-Link and electoral registration.

Table 1: Customer Service channel shift statistics

| Year | CS Telephones | CS Face to Face | CS Online Forms | Email to CS | Totals |
|---------|---------------|-----------------|-----------------|-------------|---------|
| 2013/14 | 225,694 | 143,578 | - | - | 369,272 |
| 2014/15 | 145,311 | 132,363 | - | 8,675 | 286,349 |
| 2015/16 | 154,915 | 69,170 | 36,844 | 15,930 | 276,859 |
| 2016/17 | 186,884 | 58,028 | 39,230 | 27,892 | 312,034 |
| 2017/18 | 164,284 | 42,684 | 38,138 | 30,753 | 275,859 |

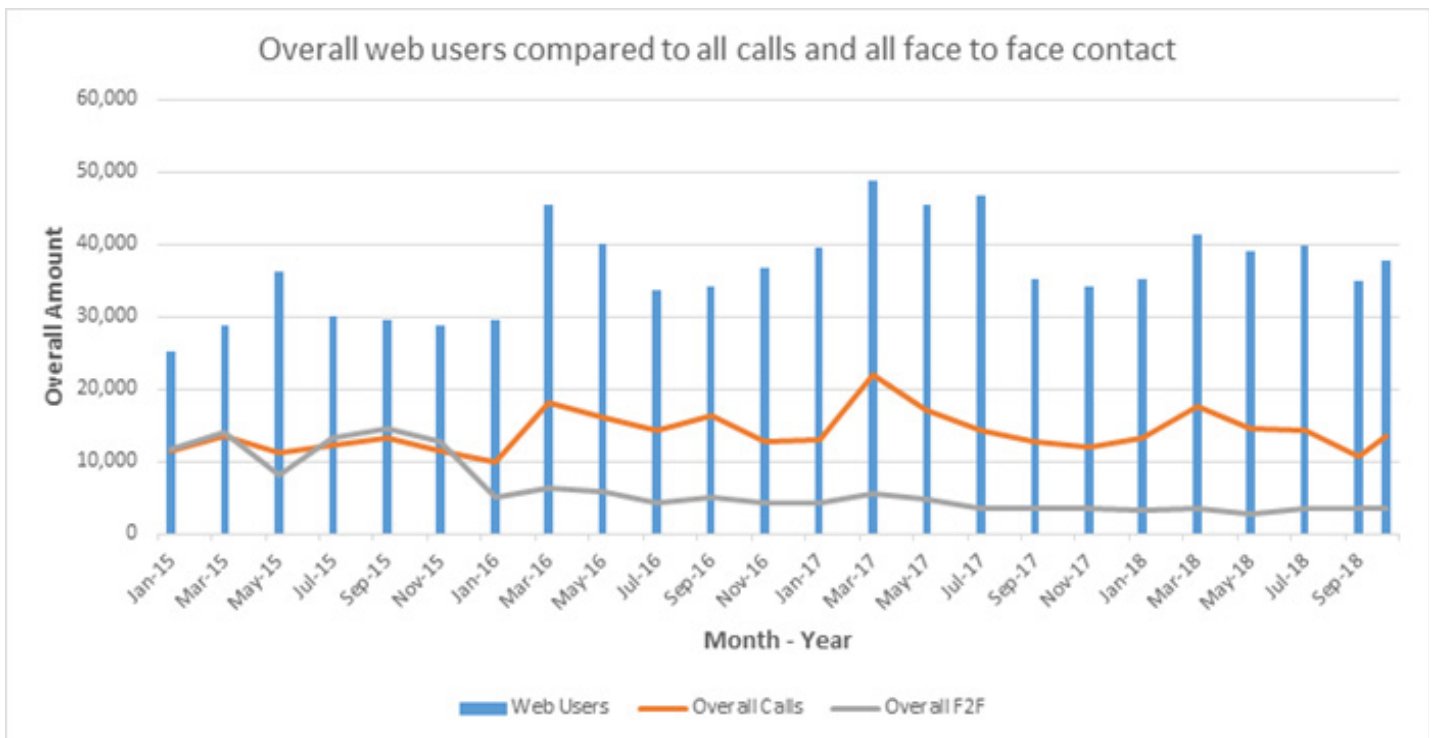
Channel shift is the term to describe customers moving from one method of contact, largely traditional such as face-to-face, to another digital method and preferring to use it, not reverting back to previously used methods.

The figures in Table 1 show a considerable shift in customer contact methods, with online and self-serve methods representing 21.5% of the total customer contacts for 16/17, increasing to 25% in 17/18.

Between 2013/14 and 2017/18 phone calls have reduced by 27.2% (61,410 calls) and face to face volumes have reduced by 70% (100,894 visits) as on-line options increase.

There is further evidence of channel shift in the most recent website analysis, providing information about the number of online users in comparison to telephone and face to face contact with the Council. The analysis highlights that since January 2015 there are an increasing number of web users compared with an overall decreasing number of face-to-face contacts.

Graph 1: 2017/18 website analysis – online vs phone and face-to-face contacts



5 | Context

The Council is ambitious and supports and delivers innovative projects. The realisation of these ambitions allows West Suffolk not only to support the future financial position of the council, but also to ensure that a consistent and excellent service is provided to anyone living, working or visiting the area, with importance placed on the ability of the Council to maintain high levels of customer service across the board

Some of the ambition presents opportunities specific to the customer service team and, in turn, for the customers we serve.

Digital by Design

We know that how we communicate with each other is changing and we need to develop services for our customers who choose online methods to do business.

We aim to make online services an excellent customer experience so that our customers choose it as their first option, where possible.

We will continue to develop our online services so that they are intuitive, easy to use and follow industry guidelines of using image icons to guide users, so that the website remains as accessible as possible.

We know that some customers appreciate being able to talk to a person, either on the phone or face to face, if things are a bit complicated or they are in crisis. We will continue to have support in our office buildings.

With user expectations and requirements changing, it is inevitable that digital literacy will feature in the design of our online service offer in future. In light of

this the council has published its Digital Services Programme which made digital inclusion a priority. It means we will design our online platform to be accessible to as many people as possible, for example making use of audio functions on our website, or providing options to change font colour and size. We will use the potential of technology to make our services more inclusive than ever before.

The Council has benefitted from working with others to deliver services and to share costs. Increasingly, the public and voluntary sector in Suffolk is looking for new opportunities to work together to support its customers whilst maintaining service levels and progressing a range of innovative projects. We will continue to work with partners to improve services, whilst recognising that some people will need support and advice from multiple partners to resolve their particular issue or set of circumstances.

Demand management

We will develop new and assess existing processes that are in place to monitor and track the success of our customer access plan, recognising and adapting to the peaks and troughs in demand we identify through regular monitoring. As part of our commitment to the effective use of data, we will only share information about our systems where it is relevant and appropriate in order to improve services, all the while protecting privacy and adhering to the GDPR principle of 'Privacy by design and default' in everything that we do.

Routes to access services

We will, as part of our action plan to deliver against this strategy, consider all of our contact points with regards to how to improve their use and enhance the customer's experience of contacting us.

Our aim is to share resources and facilities with partners to provide the most effective, and seamless, services as possible.

The Mildenhall Hub and Western Way Development

The Mildenhall Hub and Western Way Development Programme are, at their heart, building projects but they also present an opportunity for the Council to work with partners to design shared public spaces and offices, the aim being to improve the experience of our shared customers, and make accessing service much easier than before.

Both of these building projects have been designed with the user in mind. For visiting customers it will mean access to linked or partner services, such as the NHS or Citizens Advice Bureau. For anyone using the building, it will mean that the experience of visiting the council is improved because the environment is modern and comfortable, designed to be for the customers use as well as the staff. There will be access to digital services, such as public access computers and, importantly, customers will be encouraged to visit if and when they need to.

User Experience/ Customer Experience

User Experience (UX) and Customer Experience (CX) has been used in the private sector for some time now, but is emerging as a hugely insightful tool for the public sector to use.

UX and CX is where studies are carried out by experts in these two fields, and the results of these studies are used to make improvements to things like the reception processes or the website, with the aim of making things easier and better for the customer or user.

6 | Customer service values

These values support the Council's approach to customer access and transformation in the wider sense, as well as the Workforce Strategy and overall approach to Organisational Development. The following values are the key elements that define the Customer Access Strategy and drive continuous improvement as part of our regular day to day work. They are considered in the way we manage our Customer Service team, and underpin our Customer Service Standards.

Transformation

At the heart of our plan to help our customers is the development and growth of online services as we continue to see a natural fall in the numbers of face to face and telephone enquiries

Understanding

We will ask our customers what they think of the help they receive and how they would improve the service they experienced. We will use this to change things that aren't working properly and to make improvements.

Enhancement

We have already made progress with putting information online for our customers to access, alongside a number of forms to report, apply and pay for services. Our future includes expanding the online services we offer and improve the self-service element of our current systems so that customers will be able to access information about the services they have requested and paid for from the council.

Awareness

Progression of our channel shift work programme and using opportunities to increase awareness of the digital resources available for customers to use.

Inclusion

We will make sure that no customer feels disadvantaged by changes to the way we have asked them to access information about the services we provide. Customers will be able to easily access information and have their specific needs considered.

7 | Key priorities

Taking into account the council's strategic framework and ambition, we have identified six customer service priorities to be delivered. These are:

- 1** We will continue to make sure that all of our services are regularly reviewed with a focus on our delivery methods and access to services
- 2** Use the Target Operation Model as the method by which we will make decisions about online service provision and customer communication methods
- 3** Strive to maintain excellent levels of customer satisfaction through improvements to the way we ask customers to do business with us
- 4** Support all council services to encourage channel shift, making efficiencies wherever possible through process and system review
- 5** Invite feedback about how we're doing and what we could do better
- 6** Continue to work with partners and seek feedback about the way we manage our shared customers.

Details of actions which set out how we will deliver these priorities are included in the Action Plan in Appendix A.

8 | Action plan

The action plan in Appendix A sets out how we will deliver the customer service priorities set out in this strategy. It will be monitored by staff and by Portfolio Holders. In addition, the council also monitors customer feedback and performance data on regular intervals to assess the quality of service provided with relevant performance indicators monitored quarterly at Performance and Audit Committee.

Action plan - Appendix A

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|--|-----------------------|--|--|-------------------------------|--------------|
| 1. Review future customer contacts suitable for migrating to an online contact channel | Customer Service Team | Increasing the number of services providing online access channels for customer use will mean more customers than ever will benefit from being able to resolve their enquiry at first point of contact at a time and place convenient to them | Within existing Customer Service Team resources | Ongoing throughout CAS period | 1, 2, 4, 6 |
| 2. Increase availability and functionality of online forms as part of the ongoing programme of review | Customer Service Team | Increasing the availability, functionality and overall usability of online forms will mean more customers than ever will benefit from being able to resolve their enquiry at first point of contact at a time and place convenient to them | Within existing Customer Service Team resources (dependent on agreement to proposed restructure) | Ongoing throughout CAS period | 1, 3, 4 |
| 3. Maximise self-serve options for customers | Customer Service Team | Ensuring the accessibility of online content and transactional effectiveness of self-serve portals will provide customers with further opportunity for the customer to resolve their enquiry at the point of first contact, at a time and place convenient to them | Customer Service Team and ICT | Ongoing throughout CAS period | 1, 2, 3, 4 |

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|--|-----------------------|--|---|-------------------------------|--------------|
| 4. Continue the promotion of online services | Customer Service Team | Making sure customers are aware of the alternative options to conduct council business online will mean that more are encouraged to use digital methods to resolve their enquiry. | Within existing resources with support from Communications Team | Ongoing throughout CAS period | 1, 3, 5 |
| 5. Exploration of a suitable customer access platform, specifically in relation to defining the user requirements of such a system. Anticipated that that work will provide the basis for a decision about resource requirements ahead of any further decision required in relation to starting any procurement process | Customer Service Team | Integrations with back office systems, seamless automations, increased efficiency of process | Customer Service Team, Programme Office and ICT | 2020/21 | 1, 2, 3, 4 |
| 6. Sharing of information across the council | Customer Service Team | Sharing information about service provision and customer insight data provides opportunities to not only provide a better service to the customer but also assists with the identification of any system-wide improvements required. | Customer Service Team with support from the Policy Team | 2019/20 | 1, 2, 3, 4 |

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|--|-----------------------|---|---|-------------------------------|---------------|
| 7. Continuation of process improvement reviews | Customer Service Team | Ensures that any changes to the service provision since the last review or service take-on are identified and processes redefined to accommodate them, thereby improving the service to the customer | Within existing Customer Service Team resources | Ongoing throughout CAS period | 1, 2, 3, 4, 5 |
| 8. Continue to work with service areas to increase opportunities to improve customer experience | Customer Service Team | Any customer feedback received will be used to make any identified changes to processes between the front and back office, and processes are changes to reflect these | Within existing Customer Service Team resources | Ongoing throughout CAS period | 1, 2, 3, 4, 5 |
| 9. Introduce online customer survey forms for all service areas | Customer Service Team | Any customer feedback received will be used to make any identified changes to processes between the front and back office, and processes are changes to reflect these. Customer feedback will also be used to identify any customer service team training gaps or knowledge gaps, which will be factored into the ongoing staff training programme. | Customer Service Team, Strategic Comms Team ICT and Policy Team | 2020/21 | 1, 3, 4 |

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|---|-----------------------|---|---|-------------------------------|--------------|
| 10. Continue to provide support and training for customer service staff | Customer Service Team | A programme of ongoing training for the team will ensure that the standards of service expected and required will be maintained. | Within existing Customer Service Team Resources | Ongoing throughout CAS period | 3, 5 |
| 11. Creation of digital champions within the customer service team | Customer Service Team | Use of existing resources to support customers who require extra help with accessing digital only services or information. | Within existing Customer Service Team resources | 2019/20 | 3 |
| 12. Review process for tracking customer journey from first point of contact to resolution | Customer Service Team | This will allow us to better understand if customers are retrieving the information they need to resolve their enquiry at the first point of contact. It will also provide the information about how to improve the content and effectiveness of any front end systems of integrations required for the service being accessed. | Within existing Customer Service Team resources | 2019/20 | 1, 2, 4 |

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|--|-----------------------|---|---|-------------------------------|---------------|
| 13. Develop plans and identify ways to better identify, record and monitor customer insight data, and use this insight to enhance and improve access channels | Customer Service Team | This will allow us to better understand if customers are retrieving the information they need to resolve their enquiry at the first point of contact. It will also provide the information about how to improve the content and effectiveness of any front end systems of integrations required for the service being accessed. | Within existing Customer Service Team resources | Ongoing throughout CAS period | 1, 2, 3, 4, 5 |
| 14. Prepare for the introduction of new ways of working at Mildenhall Hall and Western Way | Customer Service Team | Setting up a multi-disciplinary project team means that there is time to prepare for any changes required from the move to a new shared reception. It will require the support from partner organisations as well, so will assist in the early building of working relationship in order to understand each other's working practices and requirements. | Customer Service Team, programme office, ICT | 2019/20 | 1, 4, 6 |

| Action | Action owner | Primary benefit | Resourcing | Timescale | Key priority |
|---|---|---|---|-------------------------------|------------------|
| 15. Continue to develop pathways and processes to maximise the integration and automation opportunities from the point of initial customer contact to the point of service delivery. | Leadership Team and Customer Service Team | Transparent and real-time management of customer demands across the organisation, with the aim of reducing the number of steps in the process and quicker resolution(s) for the customer. | Within existing resources of the Customer Service Team, ICT Team and programme office | Ongoing throughout CAS period | 1, 2, 3, 4 |
| 16. Continue our involvement in county-wide initiatives and discussions about integrated customer access across partner organisations. | Leadership Team and Customer Service Team | Maximises opportunities to improve and enhance the customer journey across different public sector organisations that the customer has reason to access, with the aim of only requiring the customer to tell their story once. | Within existing resources of the Customer Service Team | Ongoing throughout CAS period | 1, 2, 3, 4, 5, 6 |
| 17. Continue to capture, monitor and report the information provided through the council's existing feedback mechanisms e.g. compliments, complaints and surveys | Customer Service Team | Information provided by service users considered as part of the ongoing process review and improvement programme gives context to the changes being made to systems and online content, as well as creating a better overall experience for the customer. | Within existing resources of the Customer Service Team | Ongoing throughout CAS period | 1, 3, 5 |