

Overview and Scrutiny Committee



Forest Heath
District Council

Title of Report:	Customer Access Strategy 2019-2022	
Report No:	OAS/FH/19/002	
Report to and dates:	Overview and Scrutiny Committee	10 January 2019
	Shadow Executive (Cabinet)	5 February 2019
Portfolio holder:	Councillor Robin Millar Portfolio Holder for Families and Communities Tel: 07545 423782 Email: robin.millar@forestheath.gov.uk	
Lead officer:	Davina Howes Assistant Director Families and Communities Tel: 01284 757070 Email: davina.howes@westsuffolk.gov.uk	
Purpose of report:	To present the revised Customer Access Strategy to Committee.	
Recommendation:	<p>Overview and Scrutiny Committee:</p> <p>It is <u>RECOMMENDED</u> that:</p> <p>(1) Members review the contents of the Customer Access Strategy 2019-2022; and</p> <p>(2) Makes any amendments, and recommends the Customer Access Strategy 2019-2022 to the Shadow Executive (Cabinet), for approval.</p>	

Key Decision: <i>(Check the appropriate box and delete all those that do not apply.)</i>		<i>Is this a Key Decision and, if so, under which definition?</i> Yes, it is a Key Decision - <input type="checkbox"/> No, it is not a Key Decision - <input checked="" type="checkbox"/>	
Consultation:		<ul style="list-style-type: none"> Portfolio Holders and Leadership Team 	
Alternative option(s):		<ul style="list-style-type: none"> The Council could decide not to have a Customer Access Strategy. 	
Implications:			
<i>Are there any financial implications? If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <ul style="list-style-type: none"> Whilst there will be efficiencies gained from continuous improvement in the delivery of customer service, it is not possible to quantify these in financial terms. Significant financial savings were achieved as a result of the previous Customer Access Strategy in 2014. 	
<i>Are there any staffing implications? If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <ul style="list-style-type: none"> 	
<i>Are there any ICT implications? If yes, please give details</i>		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> The support and application of ICT is a key enabler for the delivery of customer access. At this point, no decisions need to be made in relation to the ICT required to deliver this strategy. Any future decisions needed will be subject to a business case and democratic approval as appropriate. 	
<i>Are there any legal and/or policy implications? If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <ul style="list-style-type: none"> 	
<i>Are there any equality implications? If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <ul style="list-style-type: none"> An Equality Assessment has been conducted and there are no significant implications identified as a result of adopting the Customer Access Strategy 	
Risk/opportunity assessment:		<i>(potential hazards or opportunities affecting corporate, service or project objectives)</i>	
Risk area	Inherent level of risk (before controls)	Controls	Residual risk (after controls)

Customer expectations and demands are greater than capacity levels within the team	Low	Weekly monitoring and monthly reporting of call volumes (including call waiting and call abandoned times) are captured and shared with the Customer Service Team and with Leadership Team and PASC via the Balanced Scorecard	Low*
Changes in technology means the best solutions are unaffordable	Medium	The Service Managers for Customer Services and for ICT have worked closely on this issue and will continue to do so with the CS/IT project team. Regular monitoring of the market and new technologies will be helpful when it comes to specifying a future Customer Access Platform	Low
The website does not provide customers with the best experience in terms of self service	Medium	There is an action within the proposed CAS to implement a User Experience test on any front-end systems that have a self-serve function. The purpose of this test would be to maximise the ease of use for the customer when transacting online with the council.	Low
Ward(s) affected:		All wards	
Background papers: <i>(all background papers are to be published on the website and a link included)</i>		The Customer Service Standards and the Corporate Complaints Policy (including persistent and unreasonable behaviour policy) will be available to view on the website from 7 January 2019.	
Documents attached:		Appendix A – Customer Access Strategy 2019-2022	

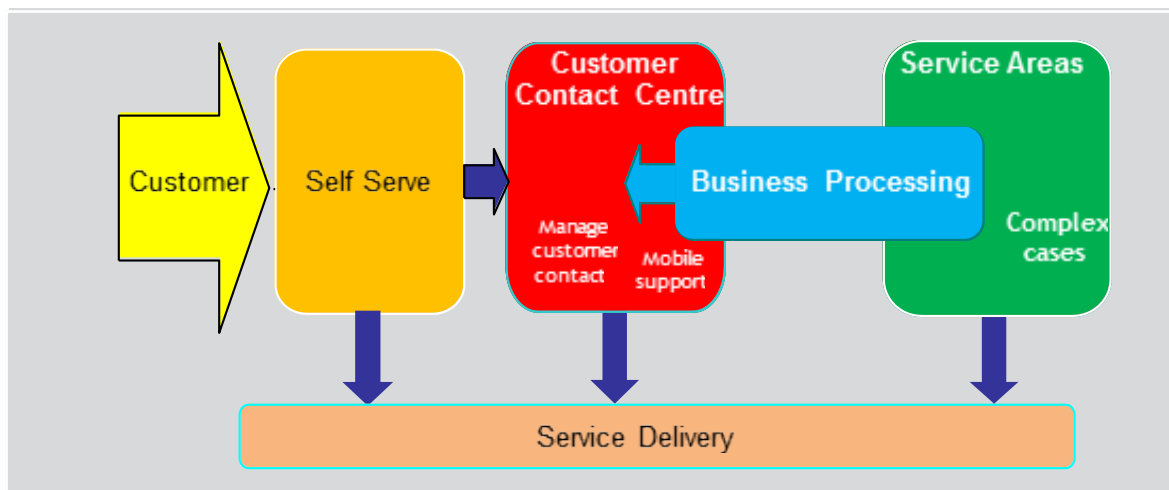
1. Key issues and reasons for recommendation(s)

1 Background

- 1.1 The councils adopted the Target Operating Model (TOM) for Customer Services (see Diagram 1 below) in 2014, marking a fundamental change to the delivery of the Customer Services function across both Councils. The motivation at the time of the implementation was to reflect the ambition to move to a single council in structure terms and to acknowledge the requirements associated with the public sector digital transformation agenda.

The general focus at the time of the implementation was to understand which of the Councils' services could be drawn into the TOM and how best to deliver those against the backdrop of efficiency improvements aimed at releasing financial savings associated with the changes (£125,579 per annum). Note that these financial savings were achieved.

Diagram 1: Customer access target operating model



2. Headlines from the post-implementation review

- 2.1 In April 2018, a review of the initial strategy objectives was conducted. Given that the purpose of the TOM was to create a system which would provide clear, accurate, timely, accessible and targeted information to customers across a range of service disciplines and across the two councils, the review considered how successful the channel shift work has been since starting to implement the change. The aim of the TOM is to ensure that customers can self-serve as much as possible with customer service staff providing assisted self-serve, further supported by service areas dealing with the more complex issues.
- 2.2 A key driver to achieve the Strategy was the ambition to achieve a 20% channel shift to move customers from a direct contact method to online and self-serve. In November 2012 a data capture exercise conducted at the time showed that the main methods of contact were telephone and face-to-face, accounting for around 369,000 customer contacts. A key part of the delivery of the TOM was to transfer staff into one Customer Service team. This team now consists of 34 staff (26.97FTE) and works across Bury St Edmunds, Haverhill, Mildenhall and

Newmarket. Suffolk Library Services provide the support from the Brandon Office

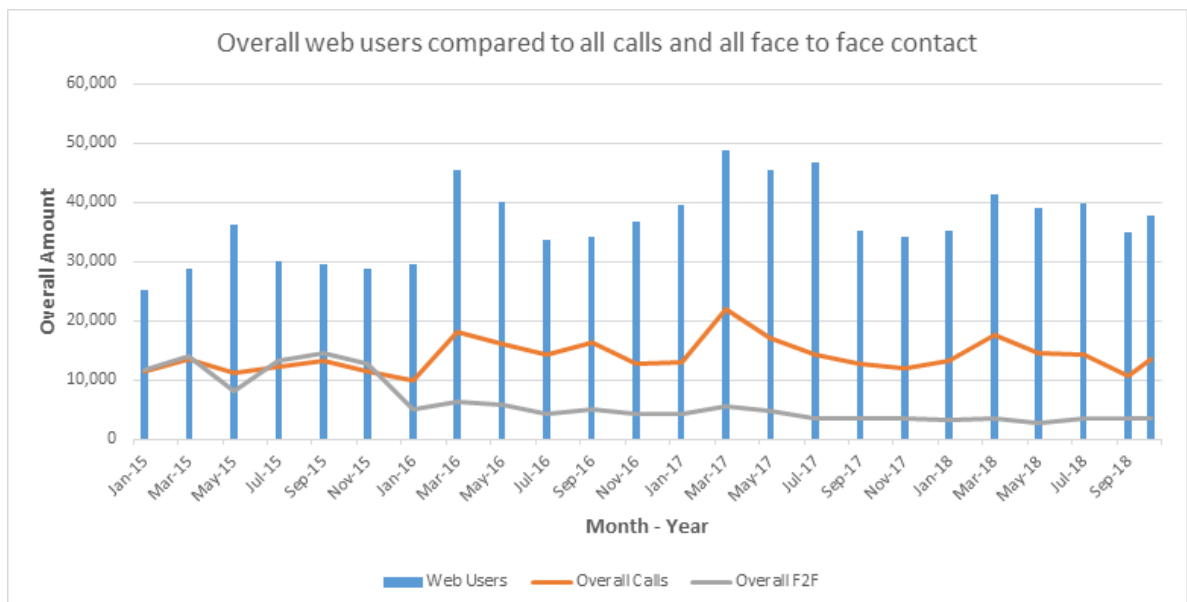
3. Review of achievement of project objectives

3.1 With an objective to achieve a 20% channel shift from direct contact to online channels and self-serve methods (amounting to around 85,000 contacts), the data captured has been used to provide the baseline in table one below. Note that the customer service team has taken on more services than originally anticipated hence the number of calls had increased, but reduced again in 2017/18. As an example, Apex calls are taken by the team and these were not included in the baseline, nor were election telephone calls.

Table 1: channel shift statistics

Year	Telephones	Face to Face	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

Graph 1. Website analysis to September 2018 – online vs phone and face-to-face contacts for Customer Service Team



- 3.2 The figures in table one 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. With total customer contacts having reduced between the baseline year and 2015/16, totals from 2016/17 showed a slight rise in customer contact levels which is attributable to the referendum, a change to the garden waste collection scheme and the implementation of a new housing system (including a few weeks where the online system was not live). From October 2017, these figures include the planning portal, elections and housing applications data which was not previously captured as part of this data suite, but the inclusion of this additional data represents the totality of the online customer access. Figures recorded for 2017/18 show a return to similar levels in previous years.
- 3.3 Between 2013/14 and 2017/18 phone calls to the customer service team have reduced by 27.2% (61,410 calls) and face to face volumes have reduced by 70% (100,894 visits) as online options increase. The face to face statistics from the earlier periods were not recorded in exactly the same way as the data is collected now; so whilst the last three years of data is very robust, it is perhaps prudent to reflect that the recording mechanism changed during the reported period. The 2015/16 figures will also reflect the move of the Brandon office to the library during that period and the concerted move to online content for self-serve purposes.
- 3.4 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 Councils. 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. Analysis from 2017/18 is showing a stabilisation of face-to-face contact levels with phone call levels remaining at a similar level over the graph period. The spike in the data in March 2017 was a direct result of garden waste renewals and the introduction of the Direct Debit payment facility for this service.
- 3.5 Generally speaking face to face contact has diminished considerably over the recorded period, with a general decline in the number of calls being made to the Customer Services team. Website use, having initially increased in the period between March 2016 - July 2017 is now settling into a more consistent level of attracting between 30,000-40,000 web users per month (having peaked at almost 50,000 in March 2017).

4. Future Customer Access Strategy

- 4.1 It is with this review that it is evident there is much to celebrate in terms of the ongoing success of the TOM and equally work that needs to be continued in order to unlock the full potential of the model, given the technological advances since the TOM was first construed in 2012.
- 4.2 The work carried out to review the 2015-2018 Customer Access Strategy has considered technology as a key element of the future provision of customer access for West Suffolk Council customers. The practical day-to-day improvements will continue to deliver the now well-tested model for managing customer contact, whilst being careful to allow the future technological environment to shape the way in which the council manages customer demands

in the future. Important in this iteration of the strategy is the clarity that there is no set pathway being followed at this time in terms of what the future will look like, instead recognising that with the market changing so rapidly, it is better to understand fully our emerging needs (based on an assessment of future opportunity and previous learning).

5. Consideration for West Suffolk Council

- 5.1 In producing the 2019-2022 Strategy, a focus has been placed on ensuring that the approach is flexible enough to deliver against the ambition and any emerging priorities of the new Council. There is of course going to be a period of transition post April 2019 and the Strategy needs to be able to accommodate changes required by the new Council members. This Strategy does this and, more importantly, provides stability; the stability being provided by the commitment to deliver more of the same and to take time to reflect the requirements for the customers and the service areas before making a decision about system updates or changes.
- 5.2 Alongside the strategy document, staff have reviewed the existing Service Standards document and also updated the existing Complaints Policy which now also includes a section on the management of persistent complainants and/or those complainants who demonstrate unreasonable behaviour as defined by the Social Care and Local Government Ombudsman. Both of these documents will be available to view on the website from 7 January 2019
- 5.3 The Strategy is accompanied by an action plan which sets out the specific activities associated with the strategy, who owns the actions and anticipated timescales. Members are asked to approve the Customer Access Strategy 2019-2022 and adopt it in readiness for the move to a single council in April 2019.