

**Customer First Strategy Refresh 2014-2017**

**Key Decision NS22/13**

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**Report of Corporate Management Team**  
**Terry Collins, Corporate Director, Neighbourhood Services**  
**Councillor Brian Stephens, Cabinet Portfolio Holder for**  
**Neighbourhoods and Local Partnerships**

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**Purpose of the Report**

1. To report back to Cabinet on the results of the consultation process for a new Customer First Strategy for the Council
2. To seek Cabinet approval of the new Customer First Strategy for the Council for 2014-2017.

**Background**

3. At its meeting in January 2014, Cabinet agreed to a 12 week public consultation on a revised Customer First Strategy for the Council to replace the existing one agreed in 2010 following LGR.
4. The main focus of the strategy document encompasses the main contact channels used by customers; streamlined service delivery and the council's approach to use of feedback, intelligence and data to inform service development. It sets out a future direction for delivery of effective customer service in the light of reduced budgets and our MTFP savings.
5. In line with the 'whole council approach' to Customer Services the Customer First Strategy seeks to broaden accessibility to information and increase online capability relating to transacting with the council. This approach will ensure best use of existing resources and buildings to provide a network of service access points which is instantly recognisable through a single branding. When implementing this approach clarity will be provided in relation to where key transactions will be offered, such as Benefits. By evolving this approach customers will have greater access to services and information in an economically efficient way.
6. It is important that the Customer First Strategy is clear, concise and linked to the wider priorities of the Council. Delivery of the Strategy will result in changes not only internally in relation to integration of services but also through enabling "channel shift" so that customers are able to access services through digital means at a time and location convenient to them.

## **Progress to date**

7. Achieving an improved Customer First ethos across the Council requires constant attention and a transformation programme requiring commitment and resource from all Council services. It is a transformation programme which will take some time to deliver and the proposed strategy covers a three year period.
8. The process has already begun however through the development and strengthening of a cross council Customer Focus Board, chaired by the Corporate Director of Neighbourhood Services and with Heads of Service representing each Service Grouping. The Board is focussed on identifying and delivering the key projects within the revised strategy.
9. Work to date in this area has already delivered significant successes, including:
  - Transfer of the front end of the Revenues and Benefits service provision to enable a First Point of Contact resolution for enquiries regarding Housing Benefit, Council Tax Support and Council Tax Billing.
  - Rationalisation of the Customer Services contact centres to provide efficiencies and a more integrated approach to telephony
  - Implementation of Homeworking in Customer Services to build resilience and provide a more flexible and sustainable solution to accommodating staff.
  - Delivery of a range of operational efficiencies to improve performance and quality in terms of call handling, waiting time and response at first point of contact
  - A new appointment based face to face service at Peterlee and at the new CAP in Chester Le Street, both based on collaboration with Housing partners to provide a more joined up approach to dealing with a range of issues and to improve customer interaction for Housing tenants.
  - Successful completion of the new facility at the Witham in Barnard Castle, offering Library and CAP in the same building, based on similar successes at Crook and Durham.
  - The review of the Office Accommodation Strategy report to Cabinet In January 2014 which enabled the Council to take stock of the future proposals for new CAPs in the light of future savings targets; resulting in changes to the future provision in some areas whilst maintaining vital face to face provision in localities
  - Identification of dedicated resource to handle e mail and web enquiries
  - Strengthened arrangements for dealing with extreme weather events

## **Ongoing work**

10. Delivery of service improvements, better service integration, providing valuable responsive feedback to customers through a range of channels and future success in terms of a more e-enabled approach to customer contact can only be achieved if the right system is in place to provide a platform for this transformation. Alongside the development of a new website, the review of the CRM is considering where the Council needs to go in relation to its future frontline systems. A mapping exercise in relation to the current ICT infrastructure is also being completed to ensure the Council's systems architecture supports future delivery of services and enables an integrated approach to providing a streamlined picture of our customers and interaction.

## **Overview and Scrutiny Review**

11. Members of Corporate Issues Overview and Scrutiny Committee have reviewed the process surrounding the development of the Customer First Strategy. The committee has focussed on the 3 outcome areas, considered a range of issues relating to service improvement and looked at best practise. The committee report outlining their findings will be available in September.

## **Consultation**

12. Given the importance and broad nature of this area, a full and comprehensive consultation exercise was undertaken to consider:

- The vision statement and main areas of focus
- Current customer preferences
- How Customers would like to transact with the Council in the future

13. The public consultation took place over a 12 week period, commencing on 20<sup>th</sup> January 2014 and running until 14<sup>th</sup> April 2014

14. A number of consultation methods were used to encourage wide participation, including:

- On-line survey (Paper copies were also made available at locations across the county to ensure those without access to PCs/internet access can participate)
- Focus Group meetings and signposting through AAPs
- Disability Partnership
- Workshop with young people

15. The full results of the exercise are available in the Members Library, however, a summary of responses is provided below:

## **Consultation Feedback**

16. The following paragraphs provide a summary of the main areas of feedback which came from the survey and focus groups and which has been used to update the strategy document.

## **The vision statement and main areas of focus**

17. A total of 1105 responses were received via the public consultation survey – 892 (80.7% (response) from the Citizens Panel and 213 (19.3% response) from the general public. Responses from the Citizens' Panel are weighted by age and gender to correct for differences within these demographics. Because of this weighting, responses from Citizens' Panel and members of the public are kept separate in this report.

18. The majority of people responding to the survey either agreed or strongly agreed with the vision with over 90% from the citizen panel and 80% from the general public.
19. For those that didn't agree here are some of their comments
- Quality of service is more important than value for money
  - Cost is at the heart of everything rather than customers
  - Can it be delivered?
  - No regard to customers who aren't able to access online services.

### **Current customer preferences for contacting the Council**

20. Almost two thirds (64%) of Citizens' Panel respondents have declared that not using online services was because they preferred other methods of contact. Nearly 63% most frequently use the telephone, with the most common reason that it was the most convenient option. The general public consultation responses were much more varied. The most common choice of contact method was using the telephone (33%), followed by visiting the council in person.
21. Currently, telephones are the most popular choice for reporting or requesting something - 74% will use this channel to report and 60% to apply for a service. The website would be used for obtaining information on council services. In relation to the general public, the preferred option is still using telephone for applying 47% and reporting at 55%.

### **How Customers would like to interact with the Council in the future**

22. Of the respondents, 72% (Citizen Panel) and 59% (general public) either agree or strongly agree with providing more online, 24/7 services for customers.
23. Comments in favour
- I want to be able to contact the council on an evening/weekend.
  - May help people get quicker and more effective response
  - Should have online services with live chat
24. Comments against
- Don't think online or self-service is better for elderly/disabled. May not have access to technology and may feel vulnerable/need to provide for people with specific needs.
  - Not everyone has access to online services/council needs to cater for everyone/poor internet available in rural areas.
  - Not always easy to navigate/website needs to be free of Jargon
25. It is therefore important that the needs of the more vulnerable are taken account of when developing our self- service offer; with a choice of channels being key to supporting this.
26. Over half of those making a comment (Citizens' Panel) felt that an appointments system for Benefits and Council Tax enquiries would be beneficial and a good idea as it would be more convenient. Only a small

amount of customers (21%) felt that a more flexible/walk in method would more appropriate.

27. There was a strong, positive response from the Citizen Panel and General Public (Over 66%) in support of being able to view transactions other than council tax online. The option to enable customers to track council tax payments online was favoured by over 50% of Citizen Panel and General Public respondents.

### **Feedback from the Disability Partnership**

28. It was felt that Face to Face services will always be required as it may be the only way that some people can communicate with the council. In addition, the availability of more 'out of hours' email responses was welcome however some will never use email and will only contact the council via telephone or face to face. The group expressed the view that staff dealing with frontline customer contact should be highly trained and more knowledgeable about services across the council in order to provide that first point of contact help. Development of staff and comprehensive information was felt to be key to this.
29. The concept of widening access to services through alternative channels was welcomed especially for people who work and it was also felt that the idea of using the Council's buildings better to enable access to a wide range of information on council services would be well received. It was also suggested that mystery shopping should be used to assess our approach to customer services – it was agreed that this should be explored with the Disability Partnership in the future.
30. The Group also felt that email is not always the best route for some people or for certain issues therefore we need to improve how call centre staff handle telephone enquiries. It was also commented that staff sometimes lack the knowledge in order to deal effectively with a customer enquiry.

### **Information from the workshop with young people**

31. A workshop with young people from Park View School in Chester-Le-Street was held as part of the consultation process. This was specifically to look at the potential for more digital and online service transactions.
32. The comments from the young people indicated that improvements to the website and the search functions were required before these could be considered to be as easy to use as other services such as google.
33. Also it was felt that the current website made finding information about the things that young people were interested in difficult, requiring too many clicks and being lost in jargon and a lot of "Local Government speak".

### **Equality and Diversity**

34. From the consultation responses in relation to the citizen's panel, there was a 9% increase in terms of 16 – 34 year olds preferring to use the website to access information (54%) against the overall figure of 45%. In terms of using the telephone, currently 71% of over 65's use this as their preferred channel;

this drops to 56% when the same group are asked about their future preferences.

35. Almost 60% of the disabled group agreed that more services should be made online 24/7.
36. There was a strong response from 16 – 34 year olds regarding using online transactions (84%) and 65% of respondents indicated they would prefer using online methods for transactions in relation to Benefits and Council Tax.
37. There was a positive response from all groups regarding appointments for Benefits and Council Tax.
38. An Equality Impact Assessment has been completed following the consultation exercise; this is attached as Appendix 3 to this report

### **Updating the Strategy**

39. The draft strategy has been updated, post-consultation, to reflect the feedback from the consultation and reflects the following key messages:
  - Make it easy for me to contact the Council
  - Get it right first time
  - Be clear on how I can expect services to be delivered and by when
  - Give me choice of how I want to contact you
  - The personal touch is important
  - Make it easier for payments to be made online
40. The foreword, context and commitments have been revised to reflect the feedback received and an updated strategy document is included as Appendix 2 to this report.

### **Next Steps: Implementing the Strategy**

41. The Council has recently embarked on a large scale transformation programme to successfully deliver the outcomes of the Customer First Strategy and the commitments contained within it. This programme has robust governance arrangements, with an organisation wide board with representation from all directorates at a Head of Service level. The programme consists of a number of individual but interrelated projects working together to provide responsive and customer focussed services through a variety of channels that meet customer needs through:
  - Telephony arrangements
  - Website
  - Information provision in facilities
  - Service Standards
  - Complaints and Feedback

- Customer Relationship Management System

## **Telephony**

42. This project focuses on how telephony contact is provided across the organisation. The Council currently publishes a large number of phone numbers. The Council is in the process of reviewing and rationalising these numbers to make it easier for our Customers to contact us and get through to the right person first time.

## **Website**

43. The Council is currently undergoing a refresh of its website to reduce and update the amount of content making it easier for customers to find information and also to make more service transactions available on line so customer can engage with the Council at times that are convenient to them. Work on revising the website has been ongoing for a while and a new revised website is expected in late summer.

44. In order to achieve successful "Channel Shift", it is important that initiatives around the e-marketplace, e-store and the ICT and developing Digital Strategies are also successfully implemented. These initiatives are therefore also within the remit of the Customer Focus Board.

## **Information Durham**

45. The Information Durham Project is focussed on providing consistent useful, relevant and required information in all the Council's facilities accessed by the public which is easily recognisable.

## **Service Standards**

46. The current service standards in place to inform customer expectations are being reviewed in the light of customer demand and organisational change. This will result in a revised Customer Charter and approach to setting service standards across the Council

## **Complaints and Feedback**

47. A review of the Council's complaints process is currently underway, looking at both the policy and the systems underpinning resolution and learning from Customer Feedback. There are a number of pilots in place across service areas to test changes to the process and to improve outcomes and learning to inform improvement

## **Review of the Customer Relationship Management System**

48. The Council is currently reviewing the requirement for a new CRM system for the organisation. A robust CRM system will be crucial to enabling the authority to improve and increase the variety of ways in which a customer can contact the authority, improve process efficiencies and customer experience for engaging with the authority. The CRM will also store customer information and feedback that will be used to shape service improvement and future service delivery.

## **Customer Access Points Review**

49. It is worthwhile highlighting the latest position in relation to the review of Customer Access Points approved by Cabinet in January. Work on a new surgery in Bishop Auckland to replace the provision operated from Old Bank Chambers has progressed well and the new arrangement will be in operation by late summer. Following a consultation exercise to gauge views of local service users, the new arrangement will operate from Bishop Auckland Town Hall and will offer a wider range of surgery appointments covering Housing Solutions and Bus Pass enquiries.
50. One of the areas considered through the consultation process was to implement an appointments based system for all appointments for Benefits/Council Tax interviews in all CAPs. This system was introduced at the new Chester le Street CAP and operates for all the “surgery” type face to face arrangements. It has been well received in those areas where it operates and makes it more efficient for the service.

## **Communication and Education**

51. It is important that all staff across the Council understand the principles of the revised strategy and are working together towards improving the initial contact, delivery and feedback mechanisms associated with customer service. This will mean developing a clear communications and implementation plan to roll out to all staff, Members and partners, ensuring that all are working towards these common goals. This will support awareness-raising with customers when key projects are delivered.

## **Recommendations**

52. That Cabinet considers the results of the consultation and approves the new Customer First Strategy for the Council
53. That Cabinet approves an appointments system to be implemented across all CAPs for Benefits and Council Tax interviews.

## **Background Papers**

Cabinet 29<sup>th</sup> June 2010 Customer First Strategy

Cabinet 15<sup>th</sup> January 2014 Customer First Strategy Refresh 2014-17

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## **Appendix 1: Implications**

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### **Finance**

The strategy aims to deliver value for money customer service within the context of savings targets

### **Staffing**

Staff have been consulted in line with the internal consultation exercise

### **Risk**

A full Risk register has been developed

### **Equality and Diversity / Public Sector Equality Duty**

The strategy document sets out a clear commitment to ensuring that equality and fairness are key features of the Council's approach to customer service. There may be a potential impact in relation to any future review of access channels which will include the future operation of Customer Access Points. A separate EqIA will be developed to inform any future decisions which this may impact.

### **Accommodation**

Any future review of the Council's Customer Access Points will be done as part of the consideration of all of the Council's contact channels and successful migration to self service

### **Crime and Disorder**

Not applicable

### **Human Rights**

Not applicable

### **Consultation**

A range of consultation exercises have been developed in line with the consultation and engagement plan

### **Procurement**

Not applicable

### **Disability Issues**

Access to services is a key component of the Strategy

### **Legal Implications**

Legal Advice has been sought and it is considered there are no implications.