



# **Corporate Issues Overview and Scrutiny Committee**

## **Customer First Task and Finish Group Review Report**



**September 2014**

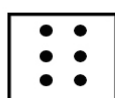


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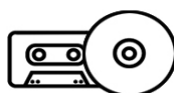
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## Foreword

Durham County Council provides services across 223,260 hectares (862 Square miles) to around 513,000 residents living in 223,000 or so households. Since the establishment of Durham County Council as a new Unitary Council in 2009, we have embarked on a systematic programme of service improvement to ensure that services are provided to all customers in an efficient, effective and consistent manner.



The development of new technology and new ways in which customers are able to do business with the Council has required a wholesale examination of our approach to customer service provision. At a time of increased demand for services, information and support against a backdrop of reducing budgets and austerity, an extensive review of customer services is being undertaken.

As part of this work and set against the refresh of the County Council's Customer First Strategy, the Corporate Issues Overview and Scrutiny Committee tasked a small group of its members to review the development of the revised Customer First Strategy and examine the potential key outcomes and service improvements that will deliver improved customer services. Key areas identified by the group include the effectiveness of the Council's existing access channels and how "channel shift" may deliver significant efficiencies to the Council; the development of customer service standards and performance measures and how the Council can build on improvements being made in collecting and analysing customer feedback to further improve services to customers. The report concludes with a series of recommendations for consideration by the Cabinet.

I would like to thank fellow members of the Task and Finish group and officers from Durham County Council and Sunderland City Council for their valuable time and assistance in providing evidence and supporting the review.

**Councillor John Lethbridge**  
**Chairman**  
**Corporate Issues Overview and Scrutiny Committee**

# Executive Summary

1. The County Council agreed a revised Customer First Strategy in July 2014, following an extensive public and stakeholder consultation process. As part of this process, the Corporate Issues OSC established a group of Councillors to review and comment upon the development of the new Customer First Strategy as well as examining the progress made, and still required to deliver against the key outcomes identified within the development of the strategy, namely:-
  - Providing a range of effective and easy to use ways in which our customers can deal with us;
  - Delivering responsive and customer focussed services, and
  - Ensuring that customer feedback informs learning and results in improved services.
2. Given the complexity of the programme of business critical activity and projects that will be essential to the delivery of the new Customer First Strategy, it is clear that a focussed plan which includes clear timelines and milestones for the delivery of these projects is needed. The Task and finish group consider that regular reports should be submitted to the Corporate Issues Overview and Scrutiny Committee which set out the progress made in respect of these projects and provide members with assurance that the focus and pace is maintained within the projects.
3. Key areas identified by the group include the effectiveness of the Council's existing access channels and how "channel shift" may deliver significant efficiencies to the Council; the development of customer service standards and performance measures and how the Council can build on improvements being made in collecting and analysing customer feedback to further improve services to customers.
4. The review has also examined the existing IT infrastructure and software capabilities and potential improvements to these that would support delivering the above.

## Customer First Strategy 2014-17

5. There is evidence that the Council has, under the leadership of the Customer Focus board, made significant progress against the Council's initial Customer First Strategy including the delivery of new Customer Access Points, the introduction of improved virtualised call centres and telephone platform, the development of a new Revenues and Benefits system, the provision of extensive customer care training across all Council staff and the implementation of enhanced working practices to improve workforce capacity within Customer services.
6. As part of the development of the revised Customer First Strategy 2014-17, the Task and finish group has expressed its broad support for

the strategy and the direction of travel proposed therein. Specific comments made by the group as part of the consultation process related to:-

- The need to emphasise that we have managed to save frontline services from major cuts and that, in doing so are making as many savings as we can from back office functions;
- The commitment within the Strategy by the Council to “make it easier for customers to contact us” should include actions relating to the wider work being carried out to make contacting the council easier;
- The “did you know” commentary bubbles should be worded to emphasise the positive achievements being delivered by the Council in respect of customers;
- In considering access channels, specifically those based around the Council’s Website and associated on-line transactions, the Council addresses access to broadband issues which exist not only in rural areas but in some urban communities, making it difficult for customers to go online and use these access channels.

### **ICT Infrastructure and Customer Relationship Management (CRM)**

7. The Council’s ICT strategy identifies how ICT will support the delivery of the Customer First strategy. In doing so it must ensure faster service provision across the County and for longer opening hours. As customers move to greater self-service, the Council should ensure that its services can be delivered across a wide range of access channels including the use of social media and smart technology.
8. Members have raised concerns regarding the availability of broadband within County Durham and the difficulties that customers have experienced regarding internet connectivity both in rural areas and also in respect of new housing developments. This severely restricts the ability for customers in these areas from doing business with the Council via digital access channels. The progress being made via the “Digital Durham” programme and other associated initiatives is welcomed and would be supported by initiatives for new housing, business and commercial developments that prioritises the need for digital connectivity in such developments.
9. The provision of an effective CRM software system that allows all services to be provided via greater automation and includes the functionality to log and process customer service requests; enables instantaneous connection to front line service operatives and provides feedback and acknowledgements to customers on progress/completion of service requests is essential.
10. The Council’s existing CRM system does not facilitate this functionality across the whole service spectrum.

11. The Group notes that the Council is currently reviewing its CRM provision and that a working group is examining the requirements that exist in developing a bespoke specification for a replacement CRM system. The group consider this work to be fundamental to the success of delivering customer services against the new Customer First Strategy and will be essential in supporting both the further development of digital access channels as well as service standards and associated performance management arrangements.
12. Evidence presented to the group during its visit to Sunderland City Council would support this.

### **Access Channels**

13. The Customer First Strategy seeks to broaden accessibility to information and increase the online capacity to transact with the Council.
14. The Group has examined various access channels used by customers in terms of demand, functionality, costs and resource requirements. Channels examined were telephones, face-to-face, E-mail, website and social media.

### *Telephones*

15. Telephone is the preferred method of contact for the Council's customers. However, the complexity and diversity of the telephone contact numbers available for the Council does not make it easy for customers to contact the Council, or for the Council to understand the nature of that incoming customer contact. Ongoing work to rationalise the telephony system for the County Council is proposed. Evidence received by the Group from Sunderland City Council, where telephone queries are directed through six dedicated numbers, supports the rationale for undertaking this work. A variety of workforce initiatives including flexible employment contracts, rotas for lunchtime working when demand increases and annual leave monitoring all ensure that ongoing demand is managed.
16. However a key objective of ongoing work is to reduce demand by reducing avoidable contact by ensuring that all correspondence is easily understood by the Customer, reducing the need to telephone or attend a customer access point to clarify matters. Correspondence should also be redrafted to encourage customers to use other access channels which have a lower unit cost per transaction such as the Council's website or e-mail.

### *Face to face/Customer Access Points*

17. The Council's Office Accommodation strategy to expand and develop Customer Access Points has been successful in increasing usage and driving demand. However, the majority of this demand comes from signposting activity and has been created as a direct result of this strategy. This signposting activity at CAPs could be reduced

significantly if digital access channels such as the Website were improved and easier to navigate for customers.

18. Notwithstanding this, it is evident from the demand and interaction information that CAPs provide a well-used service for the community and in some cases provide a vital method for customers to transact with the Council where face to face contact is required.
19. Set against the backdrop of increasing financial pressures and the recognition that a managed process of channel shift for customer services could generate significant financial efficiencies, Cabinet has agreed a revised office accommodation strategy to achieve a reduction in revenue expenditure on CAPs. Paragraph 136 sets out the CAP provision under the new strategy which will be supported by information provision under an "Information Durham" branding in a variety of Council owned properties, providing customers with signposting assistance.
20. The proposals will deliver efficiency savings in respect of operational costs of around £136,655 and are to be supported.

#### *Website and E-mail*

21. Demand for access to services digitally via e-mail and the web is increasing. Between January 2013 and January 2014, e-mails into Customer services increased by 527% and web-form use by 164%.
22. Whilst the move to digital access by customers is encouraging, the use of e-mail as an access channel brings with it some inherent problems. This is largely due to the existing CRM/logging mechanism in that it generates a significant increase in demand upon Customer services staff to manually handle and deal with customer service requests via e-mail. It is considered that a far more effective way of accessing relevant services would be via an enhanced web-form offer/functionality via the Council's website.
23. Work on developing the technology and management arrangements to deliver more effective channel shift through the enhancement of e-based methods of contact is on-going. Progress is being made on the development of an effective e-based offer but this remains some way off until underlying ICT systems, including CRM and web platforms, suffering from historic underinvestment, are updated.
24. The refreshed Customer First strategy recognises that whilst the Council remains committed to placing customers at the heart of everything we do, the means of delivering this must adapt to the changing financial circumstances and to the needs of those customers who prefer to deal with the council by other means using technology such as through the website.
25. As highlighted earlier, the Council is looking to replace its CRM system to ensure that it allows all services to be provided via greater

automation and includes the functionality to log and process customer service requests; enables instantaneous connection to front line service operatives and provides feedback and acknowledgements to customers on progress/completion of service requests.

26. The Council's ongoing website project looks to facilitate more effective channel shift through the enhancement of e-based methods of contact. In implementing a wholesale review of the Council website, the Council is making it easier for customers to use this access channel to do business with the Council, making the website a key Customer Services tool. A new content management system enables easier internal management of the system; it will have a greatly enhanced search function and be more accessible from a range of devices including mobile telephones and tablets.
27. The success of the new website as a transactional channel depends on a number of third party system projects, such as CRM development, ICON payments, mapping developments and projects specific to council tax, business rates portal and the planning application system. The success of the Council's drive to shift customer usage of access channels from face to face and telephony across to e-enabled services critically depends upon the successful implementation of the website improvement project alongside these others.
28. In supporting the website development work, the Group notes that whilst there will undoubtedly remain some customers who will not use online facilities, any improvement in website functionality that makes it more attractive to those customers who want to do business digitally, will free up telephony and CAP capacity for those customers who prefer those access channels.
29. Any such developments within the digital access channel provision must be set against the need to ensure that this demonstrates value for money and contributes to the principle of providing cost effective access channels.

### *Social Media*

30. The Council has experienced an increasing demand for information and services from customers via social media with over 19,500 people following the Council's corporate Facebook and twitter accounts. Staff within the Council's Corporate news team manage these accounts which are primarily used :-
  - To warn and inform the public – alerting residents to gritting, service disruptions, weather warnings, new jobs in the Council and forthcoming events;
  - As an appeal for help – used as a call to action with residents showing dynamic responses in sharing information and alerts thus broadening public awareness of issues;
  - To promote Council services – such as cultural offer via theatres, museums etc;



- To provide real time information about major events - Lumiere, the Lindisfarne Gospels exhibition, the County Council elections for example. These events prove incredibly popular and result in a significant increase in social media followers;
  - To respond to those customers who use social media as a customer service channel – Unlike other access channels, social media responses are highly visible and as such whilst the Council has a series of link officers within services providing standard responses, a system is in place to ensure escalation to senior management where necessary and appropriate.
31. The future for the use of social media as a key access channel for customers lies in the implementation of the revised Customer First strategy. Most social media is designed for two way conversations and, as such, it is increasingly being used by customers as a contact channel for complaints, service requests, compliments and suggestions. It is essential that the current link officer system for social media is reviewed to adapt to the increase of social media as a customer service channel. Additionally, increasing integration of social media with existing customer service methods such as the CRM system and the Highways Action Line is a priority.
  32. The development of social media as an access channel for Customers comes with a necessary caveat that this again must demonstrate value for money and contributes to the principle of providing cost effective access channels. This reflects concerns expressed by the working group around the limits on the use of social media as an access channel for customer services.
  33. The Corporate news team is working with Customer services to pilot how the Council may develop social media into a customer services channel and how this can be made a realistic proposition.

### **Service Standards**

34. The refreshed Customer First strategy identifies that the Council needs “to be clear about what standards of service customers can expect to receive from our staff when contacting the council.” In doing so the Council will “monitor our performance in relation to timeliness and quality of service and use this to make improvements where we can.”
35. The Customer First Strategy refresh includes the customer service standards and it aims to ensure that the council has a set of challenging standards within the resource capacity we have for all of our main services and that we successfully deliver against these standards.
36. There were a number of issues identified with existing service standards, the key ones being :-

- They only cover a limited number of council services and there are large parts of the council not reflected in the standards. A number of services have their own customer services standards.
  - They cover a limited number of access channels (telephone and face to face contact) with none for e-mail, letters or web-form or social media.
  - They concentrate on speed of response and do not reflect quality of response or customer satisfaction.
  - Since the standards were developed, the customer services function has taken responsibility for first line contact for revenues and benefits enquiries.
  - Public services including local authorities are facing unprecedented spending cuts. There is a drive for more efficient services and doing more with the same or less.
37. In examining research undertaken by Mori Ipsos, the Council initiated work to develop customer standards across all access channels and which aims to ensure that those standards address the key factors which influence customer satisfaction with public services, namely, delivery; timeliness; information; professionalism, and staff attitude.
38. Key principles identified for these service standards include
- A measureable time-based service standard is required for all of the Council's main access channels (telephone, face to face, letter, web-form, social media) to ensure customers are aware of the timescale in which they can expect a response;
  - Any service standard/performance measure for telephone calls should apply to all publicised telephone numbers;
  - For face to face contact, service standards should measure the actual time a customer has waited to be seen by a CSO in a CAP;
  - Optimum service performance would identify a standard that aims to resolve customer queries at the first point of contact;
  - Performance standards should be established to measure the quality of the service received by the Customers – this can be achieved by utilising customer service feedback surveys;
  - Performance Indicators monitored via the corporate performance reporting process should be supplemented by an agreed basket of local indicators;

- An agreed mechanism for utilising feedback received from customer standard/performance monitoring should be evident which demonstrates how customer learning is contributing to service improvement.
39. In examining the journey taken by Sunderland City Council in developing their Customer Access strategy, the Task and Finish group consider that the developmental work in respect of Council's Service standards should include a commitment to all customers that they will be kept informed of progress at all stages of their service journey with the Council.
40. It is considered that upon completion of the customer standards work, the Council should consider how these standards and performance measures are consulted upon both internally with service groupings and elected members but also importantly with customers themselves.
41. In examining customer services training, it is evident that existing training addresses most of the potential key customer service standards and associated performance measures. However, the Working group want to be assured that this training will be given to all Council staff, across all services and will include Councillors.
42. The development of a mystery shopping proposal as part of the customer standards project is supported and should include the involvement of elected members.

### **Customer learning**

43. A key outcome within the Customer First Strategy is that "customer feedback informs learning and results in improved services". In delivering against this outcome the Council is committed to:-
- Taking customer views into account when improving services;
  - Enabling customers to access their information securely online;
  - Using customer feedback to inform business planning;
  - Monitoring the equality impact of service changes and using that information for future service development;
  - Reviewing the way in which we deal with all customer feedback, including complaints, compliments and comments;
  - Telling customers when their feedback has been used to shape service provision through 'you said, we did' information.
44. Since 2012, the Council has adopted a systematic approach across all services in responding to customer feedback, from which a customer experience model has been developed.
45. The model uses feedback and information from service demand statistics, complaints, suggestions, compliments, the "customer journey" and survey results to produce a customer experience report. This report is considered at a customer experience meeting involving

key stakeholders within the Council including customer services representatives and service groupings to ascertain key messages and findings which, in turn, are developed into an improvement programme of activity.

46. The Council has used the customer experience model to develop and introduce a number of service improvements such as:-
- New “repeat missed container” monitoring process, reducing repeat missed bin complaints.
  - New process for requests for sand bags, including through the website.
  - Agreed approach to manage enquiries and complaints in relation to the street lighting energy reduction project.
  - Updated staff training and guidance manuals for refuse and recycling.
  - Establishment of a missing address data process in the CRM to enable customer requests to be processed consistently whilst the address file is updated.
47. Members of the Working Group consider that officers should examine the most frequently occurring complaints received by elected members from their constituents as these may collectively identify service failures. A survey amongst members or a facility whereby this information is gathered on a regular basis is suggested.
48. As new access channels are developed and implemented customers will be able to log their comment /complaint / compliment / suggestion via these channels. As a result, in the future any employee should be able to record the necessary complaint details and pass them on to the Complaints Officer in the relevant Service Area or to Customer Services.

## **Conclusion**

49. The Council’s Customer First strategy has been updated to reflect those key messages received as part of the consultation including improving ease of contact for customers and getting it right first time. The strategy commits to improving clarity for customers on how they can expect services to be delivered and to be kept informed of progress. Choice of access channels is reflected in the strategy together with ensuring that a “personal touch” approach is adopted and on-line payment facilities are easier and secure.
50. A number of key projects are being driven within the Council by the Customer First board and which are considered to be business critical to the Council in delivering against the refreshed Customer First Strategy.

51. The ongoing project work in developing and improving key ICT infrastructures including the delivery of a fit for purpose Customer Relationship Management system as well as an improved website with excellent functionality across all services will deliver significant potential improvements across services. This will contribute to the stated aims of:-
- Providing a range of effective and easy to use ways in which our customers can deal with us;
  - Delivering responsive and customer focussed services, and
  - Ensuring that customer feedback informs learning and results in improved services.
52. These projects will also shape the considerable work being undertaken to develop a suite of customer standards and associated performance measures across all services through which the Council will learn from customer experience and utilise this feedback to further improve service delivery.
53. The proactive decisions by the Council to build on the existing channel shift being demonstrated by customers in doing business with the Council, utilising digital/e-enabled service delivery at a lower unit cost to the Council will continue to contribute to the Council's drive for greater efficiencies against continued funding pressure for Central Government.
54. These efficiencies will be further enhanced through the implementation the previously agreed Office Accommodation strategy in respect of Customer Access Point development and the introduction of an enhanced "Information Durham" service provision and branding.

## **Recommendations**

55. Consideration of the review's findings has led the task and finish group to make the following recommendations:-
- (i) That Cabinet consider as part of the implementation of the refreshed Customer First Strategy, that Customer services training be provided across all Council services as part of the Corporate Training programme, such training to be prioritised to cover all customer facing service provision and also to be offered to all Councillors.
  - (ii) That the Cabinet monitor the implementation and benefits of the new CRM system currently being procured in supporting the delivery of the Customer First Strategy;
  - (iii) That Cabinet seeks to ensure that the provision of broadband/digital service connectivity in respect of new

residential, business and commercial developments is encouraged;

- (iv) That the Cabinet ensures that a focussed and structured plan for the delivery of the customer first strategy is in place which provides clarity on how those business critical projects identified within this report will be delivered including proposed timelines and delivery milestones;
  - (v) That Cabinet supports the rationalisation of the Council's telephone numbers that are promoted and advertised to a small series of golden numbers that are easily recognised and accessible by customers;
  - (vi) That the Cabinet recognises the need for Customer Access Point provision to be supported by the emerging "Information Durham" service provision that is suitably branded, easily identifiable and delivered through as wide a network of facilities and locations as possible, including partner organisations, community facilities and third sector organisations with robust support from the Council's ICT service;
  - (vii) That the Cabinet supports the ongoing development work on the Council's website and that all services commit to provide enhanced service information which will reduce avoidable contact and promote online transactions as part of a structured plan to promote channel shift;
  - (viii) That the Cabinet supports the work of Customer services and the Corporate news team to review social media as a customer services channel and to pilot ideas on how this could work;
  - (ix) That the Cabinet supports the ongoing project work to develop service standards and associated performance management arrangements across all services and, upon completion of this work, all stakeholders including the public, council staff and Councillors will be engaged upon the proposed services standards;
  - (x) That the Council support the development of mystery shopping for use as part of service standard performance management arrangements and that any such proposal include the input/involvement of Councillors.
56. It is further recommended that a systematic review of the report and progress made against recommendations should be undertaken after consideration of this report by Cabinet, within six months.

# Section 1 - Background and Methodology for the Review

## Background

57. The Corporate Issues Overview and Scrutiny Committee regularly consider customer services performance as part of quarterly performance management reports. In 2012, the Committee carried out a light touch review of telephony, but has remained interested in performance in relation to customer services.
58. At the Corporate Issues Overview and Scrutiny Committee meeting on 19 September 2013, during consideration of the Performance Management Report for Quarter 1 2013/14, reference was made to performance in respect of Customer Services including telephone answering and e-mail transactions. At that time, members were informed of the on-going work being undertaken in respect of the revised Customer First Strategy for the Council. The Committee agreed to establish a small task and finish group to provide policy development support to the refresh of the Council's Customer First Strategy.
59. The Council's Customer First Strategy was developed and adopted in 2010. Its aim was to transform the way that customers access services and the services themselves so that they are modern, efficient, effective and customer focussed.
60. The associated plan focussed on identifying and understanding the needs of our customers, measuring levels of customer satisfaction, creating a customer focussed culture within the council, making services accessible to all and to provide high quality services to our customers. The strategy was linked to the Accommodation Strategy and envisaged the expansion of face to face service provision through increased numbers of customer access points as well as harmonised and improved telephony.
61. The strategy has been partially successful and much improvement has been made including:-
  - New Customer Access Points in Consett, Durham, Seaham and Crook
  - A single resilient customer services telephone system
  - Development and publication of the golden phone numbers
  - Additional mechanisms for access channels including 'Looking Local' & Durham Talk units.
  - The roll out of a council wide Customer First – Customer Care training package to ensure that our customers receive the highest level of customer care.

## **Purpose of the Review**

62. The review sought to examine customer services, their development and the emerging Customer First Strategy to support the Council's overarching vision to 'deliver customer services that provide value for money, flexibility and choice whilst placing our customers at the heart of everything we do'.

## **Objectives**

63. The objectives for the customer first task and finish group aligned to the Customer First Strategy and work programme, namely :

### **1. Customer First Strategy**

To consider and respond to the consultation on the draft revised customer first strategy on behalf of the Council's scrutiny function.

### **2. Efficient and effective access channels**

To consider the ways in which customers can contact the Council and how these can be changed to increase both the efficiency of transaction and customer satisfaction. How can the effectiveness of these be measured internally and externally?

### **3. Customer standards**

To review corporate customer standards in comparison to standards set in other local authorities/ organisations. What is good practice, and what can we learn from others?

### **4. Learning from customer feedback**

To look at how the council collects and analyses customer feedback, and how this feedback is used to improve service delivery.

## **Focus of the review**

64. The Review sought to identify outcomes and make recommendations in respect of:-
- (i) The proposed revisions to the Council's Customer First Strategy;
  - (ii) The effectiveness of the Council's access channels for customers in terms of speed of transaction; ease of access and availability to customers and how the Council can measure this effectiveness both internally and externally:



- (iii) The development of customer service standards that improve the Council's ability to benchmark against high performing customer service organisations in both the public and private sector and how lessons can be learned to ensure continuous improvement in Customer services and the customer experience, and,
- (iv) Demonstrating how the Council can collect and analyse customer feedback and the methods by which learning from this can be transformed into enhanced services

### **Timescale**

- 65. Task and Finish Group meetings and visits took place between February and May 2014 with a report scheduled to be presented to the Corporate Issues Overview and Scrutiny Committee and Cabinet thereafter.

### **Membership of the Task and Finish Group**

- 66. The Task and Finish Group comprised the following members of the Corporate Issues Overview and Scrutiny Committee:-
  - Councillor J Lethbridge (Chair of the Working Group)
  - Councillor K Henig (Vice-Chair of the Working Group)
  - Councillor J Armstrong
  - Councillor L Armstrong
  - Councillor G Bleasdale
  - Councillor A Hopgood
  - Councillor T Smith
  - Councillor P Stradling

### **Project Support Officers**

- 67. The project was supported by the following officers:

Alan Patrickson - Head of Projects and Business Services, Neighbourhood Services.

Mary Readman - Customer Relations, Policy and Performance Manager, Neighbourhood Services.

James Anderson - Contact Centre Co-ordinator, Neighbourhood Services.

Vanessa Glover - Corporate News Manager, Assistant Chief Executive's.

Simon Luckley - Navigation and Design Work Package Lead, Assistant Chief Executive's.

Tony Thompson - Digital Durham Manager, Resources.

Tom Gorman - Corporate Improvement Manager, Assistant Chief Executive's.

## Section 2 – Customer First Strategy

### Background

68. As part of the development of Council services following Local Government Review, the Council agreed its first Customer First strategy in 2010 which aimed “to put the customer first – at the heart of everything the Council does and recognises the importance of understanding the diversity of our customers’ needs when contacting and communicating with the Council.”
69. The three year strategy aimed to transform the way that customers can access our services and also the services themselves, to ensure that they are modern, efficient, effective and customer focused.
70. The vision for customer first was to provide ***‘altogether better customer services which place our customers at the heart of everything we do’***. This was, at that time based around five themes of:-
- **Customer Insight** - Understanding and identifying our customers, consulting with them in a meaningful way and effectively measuring the outcomes of our services;
  - **Organisational Culture** - developing a culture that demonstrates positive behaviours during every contact with our customers, prioritising customer focus at all levels throughout our organisation;
  - **Information and Access** - As many services as possible should be capable of delivery through a single contact – whether this is face-to-face, by telephone, Mincom, Telly-talk or electronically via the web and other channels;
  - **Delivery** - We will promote a culture where we get it right first time and meet our customers’ expectations regarding communicating with them. We will set challenging customer service standards for our services which will take into account our responsibility for delivering national and statutory standards and targets;
  - **Quality of Service** – We will advise our customers via our customer charter about our promises about the timeliness of our responses and the quality of service they can expect to receive. We will monitor our performance in relation to timeliness and quality of service we provide and consider how we can make improvements where necessary.

## **Progress against Customer First Strategy**

71. Under the leadership of the Customer Focus Board, significant progress has been made against the initial Customer First Strategy including:-
- New Customer Access Points delivered at Barnard Castle, Chester-le-Street, Consett, Crook, Durham (Claypath) and Seaham;
  - The introduction of virtualised call centres and a new telephone platform to improve customer telephony contact;
  - Extensive customer care training across all Council staff;
  - The establishment of a series of “Golden Numbers” for key services;
  - The development of a new service delivery model for Revenues and Benefits which historically has been the service which generates the greatest demand upon customer services;
  - Enhanced working practices including the use of home working to improve workforce capacity within Customer services;

## **Customer First Strategy Refresh**

72. On 15 January 2014, the Cabinet agreed a revised Customer First strategy for the Council for 2014-17 for public consultation which, in the light of MTFP savings and changing customer preferences, will provide a direction of travel for the way in which the Council will provide access to services and a commitment to ensure customers are at the forefront of service delivery within the context of reducing budgets and diminishing resources.
73. The main focus of the strategy 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.
74. The Customer First Strategy seeks to broaden accessibility to information and increase the online capability to transact 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.
75. The strategy identifies three key outcomes which have provided the focus for the work of the Task and Finish Group, namely:-

- A range of effective and easy to use ways in which our customers can deal with us;
- Customer feedback informs learning and results in improved services;
- Responsive and customer focussed services.

## **Consultation**

76. The refresh process involved working with staff to develop a draft document which addresses the known issues surrounding effective customer care.
77. A cross council project team was set up to drive forward the refresh of the strategy, which has contributed to its content and format; this included identifying service improvements in relation to access to services and statistical data around customer contact.
78. Research data from surveys showing customer preferences in relation to access channels and demographics in terms of the make-up of our communities was used to ensure the strategy document focussed around customer needs.
79. Consultation methods were agreed to encourage wide participation, including:
- On-line survey (Paper copies were available at locations across the county to ensure those without access to PCs/internet access could participate)
  - Focus Group meetings and signposting through AAPs
  - Disability Partnership
  - Partnership Delivery Improvement Group
  - Investors in young people
  - People's Parliament.
80. The consultation took place over a 12 week period, commencing on 20<sup>th</sup> January 2014 until 14<sup>th</sup> April 2014.
81. The Corporate Issues Overview and Scrutiny Committee at its meeting on 27 January 2014 agreed that it would comment upon the proposed Customer First Strategy through this Task and Finish Group.

## **Task and Finish Group Comments on the Customer First Strategy**

82. Having examined the proposed Customer First Strategy, the Task and finish group, in broadly supporting the Strategy and direction of travel, suggest that:-
- (i) The Customer First Strategy introduction emphasise that we have managed to save frontline services from major cuts and that, in doing so are making as many savings as we can from back office functions;
  - (ii) The commitment within the Strategy by the Council to “make it easier for customers to contact us” be more specific including proposed actions that relate to the wider work being carried out to make contacting the council easier;
  - (iii) The “did you know” commentary bubbles be worded to emphasise the positive achievements being delivered by the Council in respect of Customer services – i.e. the “Did you know” bubble about only 2% of complaints going to the Local Government Ombudsman can be made more positive by highlighting that 98% were resolved by the Council without further escalation;
  - (iv) In considering access channels into the Council, specifically those based around the Council’s Website and associated on-line transactions, the Council addresses access to broadband issues which exist not only in rural areas but in some urban communities, making it difficult for customers to go online and use these access channels.

## Section 3 – Customer Relationship Management

83. Information and Communication Technology (ICT) plays an ever increasing role in people's lives at work, at home and in the way that services are accessed and delivered. Durham County Council's ICT strategy details the Council's ongoing commitment continue to deliver better life chances and improved services for the people of Durham.
84. The strategy identifies how ICT will support the Council's Customer First strategy against a backdrop of:-
- a greater and increasing demand from our customers for faster service delivery across longer opening hours and from many locations;
  - An introduction in the market of new technologies and a growth in new ways of communication such as social media, digital television and video on demand that heighten user expectations;
  - A move to greater self-service;
  - The need to demonstrate value for money, and provide Council services and more effective technology for less.
85. The Strategy also sets out proposals to support the Council's approach to serving its customers using technology where appropriate, by reviewing use of Customer Relationship Management (CRM) software.
86. Members of the task and finish group received a presentation and a demonstration of the Council's current CRM system which is used to record information on interactions with customers from their contact with Customer Services. The group also noted that currently many interactions between the public and council staff do not involve the customer services team and are not managed through the CRM system.
87. The demonstration covered the various functions used by Customer Services namely:
- Capturing details regarding a customer contact received via a call, visit, web form or e mail
  - Logging an issue
  - Booking requests
  - Making a payment
  - Identifying locations using GIS and drawing on information regarding service provision in an area via My Durham
  - Links to the Street Lighting system "edofis" in order to process a reported street lighting issue.
88. Whilst acknowledging the functionality of the existing system, it was noted that not all property records were contained within the CRM

system and that there is no direct mechanism to link the CRM system to other databases such as the Electoral Register.

89. Furthermore, only the details of those customers who had transacted with the Council were captured by the CRM system and that was predominantly achieved by Customer services staff manually logging details of customers when dealing with service requests. Accordingly, there is little by way of automation built in to the CRM system either for logging customer details or passing service requests directly to service departments and front-line staff. This lack of functionality has led to delays in addressing customer service requests due to the need for customer services staff to undertake such tasks manually via the Council's e-mail infrastructure. It also follows that where customer services staff are undertaking this role then that customer service resource available to deal with face to face and telephone queries is diminished.

### **Review of CRM provision**

90. The Council is currently reviewing its CRM provision to enable the Council to improve and increase the variety of ways in which a customer can contact the Council, improve process efficiencies and customer experience in engaging with the Council. The CRM system will store customer information and feedback which will assist the Council in shaping future service improvement and service delivery.
91. A mapping system in relation to the current ICT infrastructure is being completed to ensure that the Council's systems architecture supports the future delivery of services.
92. Following the review, a series of recommendations have been proposed including the establishment of a CRM owners group; a CRM system replacement roadmap; the alignment of CRM to the customer first strategy and the development of a business case for CRM replacement.
93. As part of ongoing development work, the owners group has considered the strategic objectives for the Council in respect of its CRM provision and examined how an improved CRM infrastructure could address existing shortcomings that have been identified in respect of:-
- Efficient and effective access channels;
  - Responsive and customer focused services;
  - Treating people fairly and respecting differences;
  - Creating channel shift;
  - Creating greater use of customer insight to influence and improve service design, provision and feedback;
  - Harmonising services and processes across the Council, and
  - Delivering value for money.

94. Work is progressing in respect of the development of a bespoke specification for a replacement CRM system which will deliver against the identified objectives. Thereafter, the procurement of a replacement system will be prioritised.



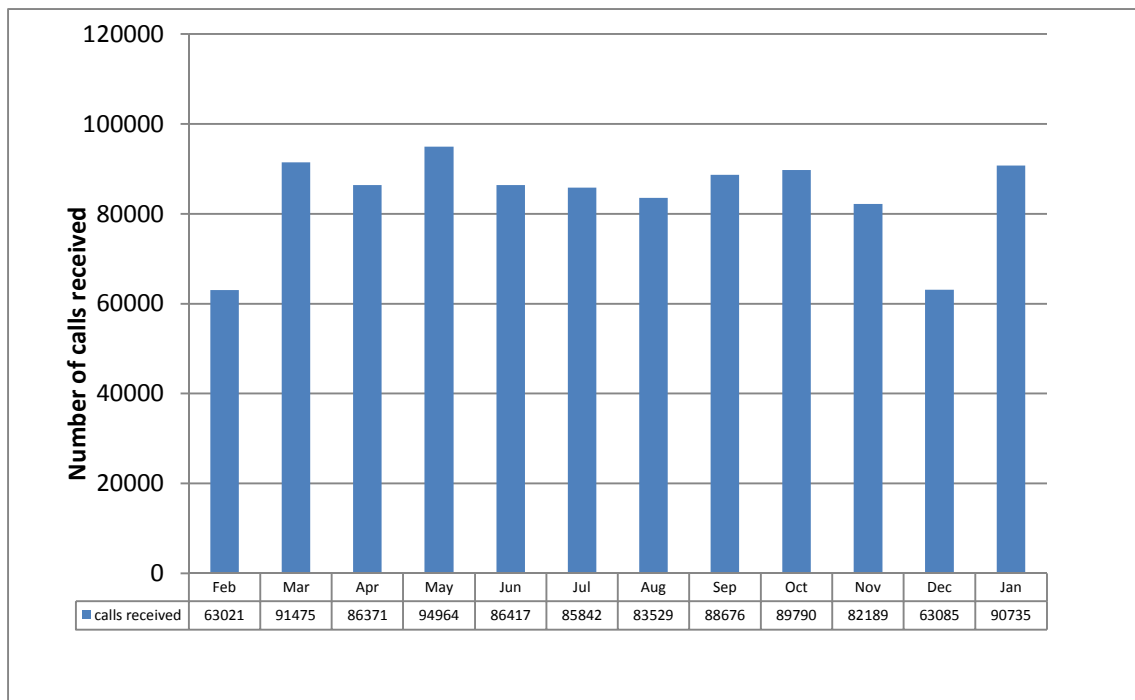
## Section 4 – Access Channels

95. In line with the 'whole council approach' to Customer Services, the refreshed Customer First Strategy seeks to broaden accessibility to information and increase the online capability to transact with the council. This approach ensures the best use of existing resources and buildings to provide a network of service access points which is instantly recognisable through a single branding, provisionally entitled "Information Durham".
96. The Customer First Strategy is clear, concise and linked to the wider priorities of the Council. Delivery of the Strategy will result in changes both internally in relation to integration of services and enabling "channel shift" so that customers who are able and want to access services through digital means at a time and location convenient to them.
97. The refreshed strategy recognises that whilst the Council remains committed to placing customers at the heart of everything we do, the means of delivering this must adapt to the changing financial circumstances and to the needs of those customers who prefer to deal with the council by other means using technology such as through the website.
98. One of the key mechanisms for delivering these objectives is channel shift; with movement of customer contact away from expensive channels and towards cheaper channels wherever possible. Face to face remains the most expensive way of dealing with customer enquiries, with benchmarked SOCITM figures of £8.62 per transaction against £2.83 for telephone transaction and £0.15 per web transaction.
99. The current strategic position is therefore in transition, balancing out the agreed accommodation strategy, the need to deliver immediate savings, and the developing strategy of channel shift to provide a low cost, sustainable service in the longer term.
100. The Working Group examined various access channels used by customers to do business with the Council in terms of:-
  - Demand – levels of customer interaction across the various access channels;
  - Functionality – how effective is each access channel;
  - Costs – What is the most cost effective access channel provided by the Council;
  - Resourcing – what resources does the Council invest in the access channels in terms of ICT and staff resources.
101. The five access channels examined were:-

- Telephones;
- Face to Face contact
- E-mail
- Website
- Social Media.

## Telephones

102. Each year the Council answers more than 1,000,000 telephone enquiries and deal with more than 270,000 face to face enquiries in our customer access points. Telephone is the preferred method of contact for our customers.
103. During the period February 2013 to January 2014, the total telephone calls received into the Council via a “contact centre” exceeded 1,000,000 and included calls received by Council Tax Billing, Housing and Council Tax Benefits, Revs & Bens Hotline, General Enquiries, Streetscene Services, Highways, Durham City Homes, Switchboard, Social Care Direct, Council Tax Recovery, NNDR, Visit County Durham, Integrated Transport Unit, Property Helpdesk and the Gala Theatre.



104. The complexity and diversity of the telephone contact numbers available to customers is reflected in the fact that the Council currently advertises 1080 numbers including 682 for Council services, of which 568 are unique.
105. A range of configurations are in place to handle telephony contact including:-

- An Automatic Call Distributor (ACD) contact centre
  - A Non-ACD contact centre
  - Single line phones to a specialist for certain services
  - A variety of building reception desks such as libraries, leisure centres, sure start centres.
106. An ACD call centre responds to a caller with a voice menu and connects the call to appropriate Customer services staff. It also distributes calls equally to staff. This system also allows for an updated position in the queue to be identified and provided in a message to the caller.
107. The ACD system enables calls to be routed through to the correct Customer services staff with the skills available to deal with that particular service/customer enquiry.
108. Services handled through the ACD centre include Care Connect; Customer services; Initial Response team, property helpdesk and social care direct.
109. Non- ACD services include Planning, school admissions and transport, registrars services and welfare rights.
110. In view of the complexities of the current system, it is essential that the Council takes steps to make it easier for customers to contact us with work ongoing to rationalise the telephony system.
111. 77% of calls made to the Council initially are handled in an ACD contact centre and since May 2013 the Council reports all ACD contact centre data.
112. A previous scrutiny light touch review of telephony undertaken in 2012 following member concerns at below target performance in respect of telephone call answering, identified the importance of managing demand for telephony service and dealing with anticipated spikes in demand associated with service activity.
113. As part of the council tax billing and council tax benefits notification process for 2013/14, service management put in place arrangements to manage the anticipated increase in customer demand for these services. These included:-
- 20 Revenues and benefits staff allocated to taking calls over a two week period;
  - No Customer services staff allowed to take annual leave during the billing period;
  - Additional hours offered to part time staff and extra staff taken on for a month to deal with streetscene, highways and Durham City Homes calls.

114. The rationale for these initiatives lay in the average number of calls taken rising from 550 per day to 1546 per day for council tax billing and from 370 per day to 1099 per day for benefits.
115. Whilst call demand over this period increased by 22%, 51% more calls were answered during the 2013/14 billing period than for the 2012/13 period.
116. To deal with ongoing demand for the telephony service and to ensure that staffing resources are at an optimum level, workforce management software is used in association with performance management information to map resources to demand. A variety of workforce initiatives including flexible employment contracts, rotas for lunchtime working when demand increases and annual leave monitoring all ensure that ongoing demand is managed.
117. Dealing with “avoidable contact” also requires significant time and resources that could otherwise be used to meet other work demands, or resources that simply wouldn’t be required at all, thus reducing costs. It also impacts negatively on the council’s reputation. It has been acknowledged that any customer contact made with the council as a result of the council either failing to provide at the correct time a service it is responsible for delivering, or sending correspondence that the customer cannot understand, is classified as “avoidable” i.e. the customer would not have had occasion to contact the council had we “got it right” the first time.
118. The Council could reduce avoidable contact by ensuring that all correspondence is easily understood by the Customer so that there is no need to telephone or attend a customer access point to clarify matters. Correspondence can also be redrafted to encourage customers to use other access channels which have a lower unit cost per transaction such as the Council’s website or e-mail to clarify matters. This would significantly reduce the level of resource required by the Council in terms of financial resources and would also enable staffing resources within the telephony system and CAPs to be used by those customers who need this type of contact.

### **Face to face contact – customer access points**

119. Agreed by Cabinet in November 2010, the Council’s Office Accommodation Strategy seeks to enhance the Council’s customer service provision and rationalise office accommodation.
120. The Office Accommodation Strategy identified locations from which Customer Access Points would either be developed or moved. These were based around areas of need and with facility design influenced by customers. The current Office Accommodation Strategy is an “invest to save” programme.

121. The Council currently operates nine Customer Access points in Barnard Castle; Bishop Auckland; Chester-le-Street; Consett; Crook; Durham (Clayport); Seaham; Spennymoor and Stanley as well as the Customer Service desk within County Hall Durham.
122. Between April 2013 and January 2014 almost 220,000 customers attended the CAPs as detailed below:-

Customer Access Point	No. of visitors	
	Jan 14	Apr 13 – Jan 14
Chester-le-Street	1,315	15,603
Consett	2,459	23,579
Stanley	1,945	17,164
Clayport	2,206	08,896
County Hall	3,362	27,273
Seaham	2,998	28,321
Old Bank Chambers	983	9,391
Crook	3,530	33,296
Teesdale	806	10,548
Spennymoor	3,311	32,207
<b>Total</b>	<b>22,915</b>	<b>218,278</b>

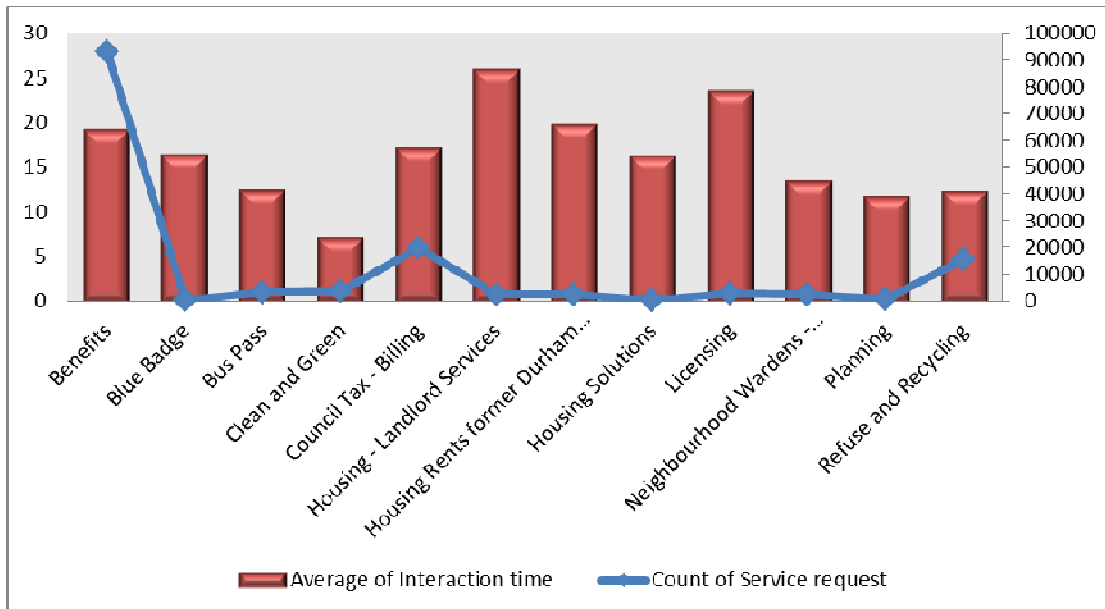
123. Although CAPs are primarily used to manage Customer Services interactions they also host / enable a number of other services.

Primary Customer Services functions	Signposting / other duties carried out by Customer Services staff	CAPs hosting services for
<b>Street scene services</b> e.g. Pest Control; Anti-Social behaviour (Neighbourhood Warden activities)	Libraries Cultural events (e.g. Lumiere tickets)	Housing Solutions Planning Welfare Rights (Crook)
<b>Direct Services</b> e.g. New bin orders, missed bin requests, special collections; Assist List	Reception duty for other services / buildings General help / advice	Blue badges Licensing Registrars
<b>Highways</b>		

<b>services</b> e.g. Pothole reporting, streetlighting faults; flooding issues		
<b>Benefits interactions</b> – processing Housing Benefit and Council Tax support scheme applications; recording changes in circumstances		
<b>Council Tax Billing</b> interactions		
<b>Licensing Pilot</b> (Consett)		
<b>Durham City Homes</b> – repairs; rents		
<b>Bus Passes</b>		

124. Demand for each of these services varies at each CAP although the most common non-signposting transaction at all CAPs is benefits enquiries, while other frequent transactions vary with location. It should be noted that almost all CAPs include a hosted service in their top 5 transactions such as housing solutions, planning or licensing.
125. The Office Accommodation strategy to expand and develop CAPs has been successful in increasing usage and meeting demand. Usage is currently increasing, with 55% more customer visits at CAPs in Q1 2013/14 when compared to Q1 2011/12. The majority of this demand comes from signposting activities and has been created as a direct result of the strategy to develop new and co-located facilities.
126. There is demand for faster, easier contact at a time and place that is convenient to the public. We need to meet this demand. We also need to ensure that we are providing access channels which give good value for money at a time when we have to reduce resources to achieve efficiencies. Also the Government's approach to 'Digital by Design', which aims to deliver public services online or by other digital means, will increasingly see public services being required to consider digital access as the first option. However, we must recognise that there are still groups of people who do not have access to the internet or have a need to access services via a traditional method.

127. Just as demand varies so does the interaction time. The table below shows the average interaction time for some of the most popular interview based transactions against the yearly demand for the service. This data only relates to interactions that require a customer service intervention and does not include signposting.



Note: Blue badges, housing solutions and planning are hosted services in the CAPs

128. It is estimated that 73% of all demand managed via CAPs currently requires a face to face interaction. The largest interaction type by volume of demand is benefits, where interviews take on average 19 minutes.

129. Face to face transactions are most commonly preferred by the customer, or required by the Council, for one or more of the following reasons:

- Council processes require that original documents be produced and witnessed.
- Council processes require that other validation is required on a face to face basis.
- Familiarity with staff and their understanding of individual cases.
- Assistance with forms is required due to literacy or comprehension needs.
- Processes rely on paper documents, for example some planning issues.

130. It can be determined from the demand and interaction information that CAPs provide a well-used service for the community and in some cases provide a vital method for customers to transact with the Council where face to face contact is required.

131. A report to Cabinet in January 2014 detailed the current position and future direction of travel in relation to providing face to face access to services through Customer Access Points (CAPs). The report presented options for consideration and proposed a way forward in the light of customer requirements and savings targets.
132. The Government's 2015/16 spending round and the finance settlement consultation published in the summer of 2013 identified a continuing deteriorating financial position for local government. The Council's most recent Medium Term Financial Plan (MTFP4) has identified that the level of savings required in the period 2011 to 2017 has increased considerably to a figure of £222m.
133. Total revenue expenditure on Customer Services is approximately £4.06m, of which 50% is spent on CAPs.
134. Set against the backdrop of increasing financial pressures and the recognition that a managed process of channel shift for customer services could generate significant financial efficiencies, Cabinet agreed to revise the office accommodation strategy to achieve a reduction in revenue expenditure via the CAPs.
135. Under the proposals, Spennymoor, the most popular CAP, will remain open as a staffed face to face CAP. Newton Aycliffe, Bishop Auckland and Peterlee will offer a surgery based service. This would be provided from suitable locations and through working with other service providers.
136. This would result in all the areas identified in the Office Accommodation Strategy receiving a Customer Service offer, as detailed in the following table.

### **Service provision agreed**

<b>CAP</b>	<b>CAP model</b>
<b>Barnard Castle</b>	Co-located CAP and Library
<b>Bishop Auckland</b>	Surgery
<b>Chester-le-Street</b>	Co-located CAP and housing provider
<b>Clayport</b>	Co-located CAP and Library
<b>Consett</b>	Dedicated CAP
<b>Crook</b>	Multi Use Centre
<b>Newton Aycliffe</b>	Surgery
<b>Peterlee</b>	Surgery
<b>Seaham</b>	Multi Use Centre
<b>Spennymoor</b>	CAP
<b>Stanhope</b>	DurhamTalk
<b>Stanley</b>	Co-located CAP and Library

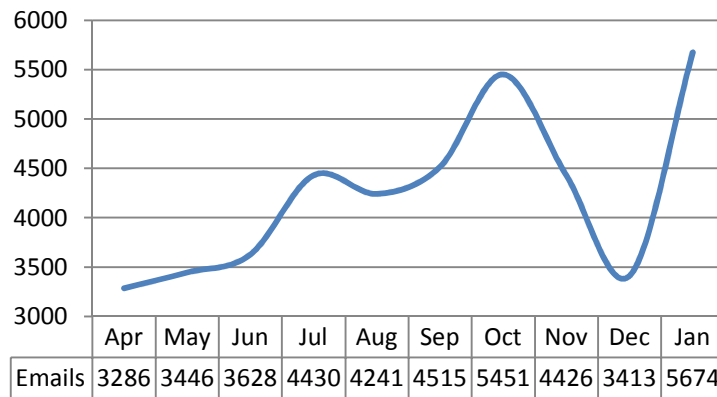


137. In addition to CAPs identified above, information is available in a variety of Council owned properties, providing customers with signposting assistance. This new provision will be presented under a common 'Information Durham' branding alongside identified CAPs.
138. The development of the "Information Durham" customer service provision aims to ensure that Council service information is available across as many Council, community and partner facilities as possible such as One Point centres, libraries, sports and leisure facilities. This provision could range from remote IT/Web-based services, Freephone telephone provision and leaflet displays but will be instantly recognisable as a Council brand.
139. This will considerably increase access to services when compared prior to LGR. All of the areas identified in the Office Accommodation Strategy would still receive a service of some type, with a further enhancement upon implementation of the strategic direction of 'Information Durham'.
140. The Customer First Strategy has a direction of travel to deliver more efficient and effective access channels and more responsive customer focussed services. The refreshed strategy recognises that whilst the Council remains committed to placing customers at the heart of everything we do, the means of delivering this must adapt to the changing financial circumstances and to the needs of customers who prefer to deal with the council by other means using technology such as through the website.
141. One of the key mechanisms for delivering these objectives is channel shift; the movement of customer contact away from expensive channels and towards cheaper channels wherever possible. Face to face remains the most expensive way of dealing with customer enquiries, with benchmarked SOCITM figures of £8.62 per transaction against £2.83 for telephone transaction and £0.15 per web transaction.
142. The current strategic position is therefore in transition, balancing out the agreed accommodation strategy, the need to deliver immediate savings, and the developing strategy of channel shift to provide a low cost, sustainable service in the longer term.
143. In line with the 'whole council approach' to Customer Services the Customer First Strategy seeks to broaden accessibility to information and increase the online capability to transact with the Council, through the concept of 'Information Durham'
144. This approach will seek to maximise existing resources and buildings to provide a network of service access which is instantly recognisable. When implementing this approach clarity needs to be provided in relation to where key transactions will be offered, such as Benefits. By

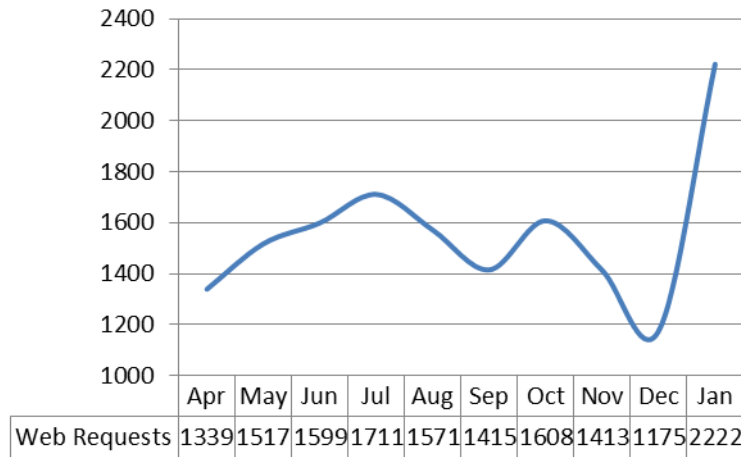
evolving this approach customers will have much greater access to services / information with little to no revenue budget implications.

### **E-enabled contact – Website and E-mail**

145. Work on developing the technology and management arrangements to deliver more effective channel shift through the enhancement of e-based methods of contact is on-going. Projects have been initiated to improve the website, develop the Civica e-billing / open access system and the 'proof of concept' for online booking and payment of a new bin request. By offering these alternative methods of accessing services it is anticipated that demand via traditional methods of contact will reduce.
146. Progress is being made on the development of an effective e-based offer, although this remains some way off until underlying ICT systems, including CRM and web platforms, suffering from historic underinvestment, are updated.
147. We know that our customers' expectations regarding the way they can access our services are changing; for example, one independent survey showed that 44% of our households use the internet to make payments, higher than nationally typical.
148. The refreshed strategy recognises that whilst the Council remains committed to placing customers at the heart of everything we do, the means of delivering this must adapt to the changing financial circumstances and to the needs of customers who prefer to deal with the council by other means using technology such as through the website.
149. Demand for accessing services digitally via e-mail and the web is increasing. Between January 2013 and January 2014, emails into the Customer services increased by 527% and web-form use by 164%.
150. Customers contacting the council for general enquiries can use the [help@durham.gov.uk](mailto:help@durham.gov.uk) e-mail address. A small dedicated team within the service deal with this contact within the agreed service standard of a response within 48 hours, although this is usually achieved within 24 hours. The graph below shows e-mail contact from April 2013 to January 2014.



151. Whilst the move to digital access by customers is encouraging, the use of e-mail as an access channel brings with it some inherent problems. This is largely due to the existing CRM/logging mechanism in that it generates a significant increase in demand upon Customer services staff to manually handle and deal with customer service requests via e-mail. It is considered that a far more effective way of accessing relevant services would be via an enhanced web-form offer/functionality via the Council's website.
152. Service requests are frequently made via the Council's website and on-line web-forms. The Council's existing website enables customers to:-
- Submit and sign e-petitions;
  - Respond to Council consultations making use of the Council's "Survey Monkey" account to create online forms for users to submit responses to consultation questions;
  - Make payments for certain services including buying a birth certificate, paying council tax and other general invoices;
  - Find a range of council facilities based upon their postcode using the "My Durham" web portal;
  - Use on line forms in respect of certain services to apply for services and report issues in respect services;
  - Renew and reserve library items via Library On-line.
153. The graph below shows the number of web requests generated from April 2013 to January 2014.



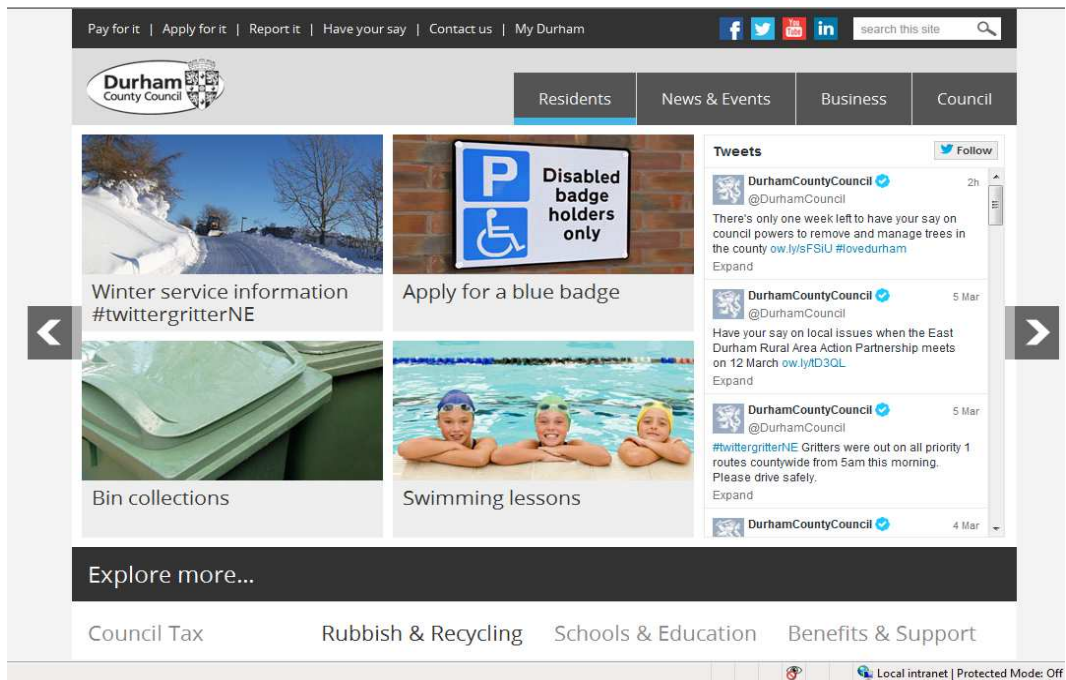
154. As part of the ongoing work to facilitate more effective channel shift through the enhancement of e-based methods of contact, an examination of the Council Website's new Content Management System (CMS) has been undertaken.
155. During 2013, Durham County Councils website had more than 3m web visits and more than 10m page views suggesting that there is an ongoing shift in the way in which some customers are choosing to do business with the Council.
156. The ongoing website improvement project addresses concerns around the website being dated and not fit for purpose. The Society of Information Technology Management 's (SOCITM) website rating system, which was an industry rating with a maximum of four stars, gives Durham's website a one star rating.
157. The new Content Management System is a complete redesign of the website which aims to make it easier for customers to use; improves the ability of the website to be internally managed and also makes it more suitable for mobile telephone and tablet usage.
158. The website was split into the following main sections;
- Residents
  - News and Events
  - Business
  - Council
159. To prevent users from being diverted to different sections, the website has been designed so that once a user enters a section, they are unable to divert to another, unless they return to the home page.
160. The new home page includes a slideshow of the five most popular pages, however it can be updated instantly with anything that the Council deems important for users to know, for example severe weather warnings or changes to council services.

161. The content menu at the top of the home page directs users to the following main services;
- Pay for it
  - Apply for it
  - Report it
  - Have your say
  - Contact us
  - My Durham – a feature to direct people to their local area news, events, bin collections etc.
162. The webpages are designed to use large and medium sized icons designated by the most popular pages accessed. The icons are allocated depending on the number of visits to each page and this feature is automatically updated by the new Content Management System. There is also a new feature which links to relevant functions and gives users the option of a shortcut to specific information they might be looking for.
163. These links include report it, apply for it and contact us, which whilst an existing function of the previous website, will send web forms to the correct service and acknowledges them so that customers know that their query is being dealt with.
164. During a demonstration of the new Website, members of the working group have suggested that:-
- The Council notes Customer feedback which highlighted that the language used on the website should be easy for people to understand. By way of example, customers prefer words such as 'refuse' to be described as 'rubbish' and 'household waste recycling centres' to be referred to as 'tips';
  - Users should be able to undertake a postcode search for local area information, and whilst this is the purpose of the My Durham function, this might not always be clear to the customer and may be misinterpreted as being solely about Durham City or County Durham.
165. The success of the new website depends on a number of third party system projects, such as CRM development, ICON payments, mapping developments and projects specific to council tax, business rates portal and the planning application system. It clearly remains that the success of the Council's drive to shift Customer usage of access channels from Face to face and Telephony across to e –enabled services critically depends upon the successful implementation of the website improvement project alongside those others identified here.

166. Councillors retain some reservations with the move to e-enabled service delivery, as there are service users who would never be persuaded to access online facilities, particularly the elderly.
167. Members note however that, the website refresh is primarily aimed at making the system easier to navigate for all people who have access to the internet. It is envisaged that, in improving the functionality of the website, thus making it more attractive to customers who prefer doing their business on-line, this will free up telephone operators and customer access points, allowing them to dedicate more time to people who require essential telephone exchange or face-to-face contact.
168. Any such developments within the digital access channel provision must be set against the need to ensure that this demonstrates value for money and contributes to the principle of providing cost effective access channels.

## **Social Media**

169. The Council has experienced an increasing demand for information and services from customers via social media with over 16,000 people following the Council's corporate Facebook and twitter accounts. Staff within the Council's Corporate Communications team manage these accounts which are primarily used :-
  - To warn and inform the public – alerting residents to gritting, service disruptions, weather warnings, new jobs in the Council and forthcoming events;
  - As an appeal for help – used as a call to action with residents showing dynamic responses in sharing information and alerts thus broadening public awareness of issues;
  - To promote Council services – such as cultural offer via theatres, museums etc;
  - To provide real time information about major events - Lumiere, the Lindisfarne Gospels exhibition, the County Council elections for example. These events prove incredibly popular and result in a significant increase in social media followers;
  - To respond to those customers who use social media as a customer service channel – Unlike other access channels, social media responses are highly visible and as such whilst the Council has a series of link officers within services providing standard responses, a system is in place to ensure escalation to senior management where necessary and appropriate.



Digital customer services via DCC Website

170. The importance of social media contact lies in the need for quick responses that acknowledge that an issue has been reported and how the Council will address the issue and finally confirm what action has been taken. The speed of response to social media contact can turn complaints into compliments, for example:-



171. Social media is also unique because it is possible to provide pre-emptive customer service, particularly around large scale Council events. During Lumiere, the hashtag #lumieredurham was set up months in advance and included in all promotional material, allowing the Council to monitor people using the hashtag and answer their queries without them even contacting us.
172. The future for the use of social media as a key access channel for customers lies in the implementation of the revised Customer First strategy. Most social media is designed for two way conversations and

as such it is increasingly being used by customers as a contact channel for complaints, service requests, compliments and suggestions. It is essential that the current link officer system for social media is reviewed to adapt to the increase of social media as a customer service channel. Additionally, increasing integration of social media with existing customer service methods such as the CRM system and the Highways Action Line is a priority.

173. The Corporate news team is working with Customer services to pilot how the Council may develop social media into a customer services channel and how this can be made a realistic proposition.
174. The development of social media as an access channel for Customers comes with a necessary caveat that this again must demonstrate value for money and contributes to the principle of providing cost effective access channels

### **Digital Durham programme**

175. The Council's ability to facilitate customer service users' shift from face to face and telephony to web-based, e-mail and social media will largely be determined by the accessibility of broadband/internet infrastructure provision throughout the County.
176. The Council's Digital Durham programme is designed to provide superfast broadband to all businesses, homes and communities across the County.
177. Based on the outcome of the programme's procurement process and completion, 96% of premises in Durham will have access to a superfast broadband (in excess of 24 megabits per second mbps) while 98% will have access to a fibre broadband service (Next Generation Access NGA).
178. Services will be sustainable and provided by retail Internet Service Providers (BT, Sky, Talk Talk etc.) at the same rates that are provided across the country.
179. All remaining premises in the County will have access to a minimum service of 2mbps and the programme will continue to try and improve this service level.
180. The Programme is actively involved in digital inclusion and demand stimulation activities and is:
  - a. Working with BT to develop a programme of activities around individual cabinet deployment.
  - b. A Go On North East member.



- c. Providing digital inclusion training with Neighbourhood Services staff.
  - d. Working with Business Durham to look at a programme of work relating to business engagement and take up on business parks.
  - e. Working with town centre managers to investigate how digital access can regenerate our town centres.
181. Regarding the Cabinet deployment process, this was accompanied by a targeted leaflet campaign to promote the enhanced service and encourage both domestic and commercial sign-up to the service. This process allows for a percentage of the revenue generated to be paid back to the Council and made available for further investment into the scheme if a certain number of properties sign up to the fibre optic services.
182. One initiative examined that aimed to improve digital inclusion was “ Go ON NE”, a multi-agency board which included organisations such as Lloyds Bank, Argos, Talk Talk, BBC, Post Office and EE, working in partnership to improve digital skills. A 6 month campaign to boost the basic online skills of people, small business and charities in the North East, the initiative consisted of running events, providing access points or offering incentives. Funding was also made available to businesses as an incentive to train NEETs and work with local communities, and there was a small amount of funding available to Registered Social Landlords with regular meetings to improve and support them in improving digital skills in County Durham. In addition, Area Action Partnerships were being consulted to promote services and Digital Durham had commissioned a former mobile library to travel around localities and host roadshows.
183. In considering the problems that have been experienced in the more rural parts of County Durham regarding connectivity, some areas of County Durham are so remote that they do not have a telephone exchange to facilitate broadband access. In order to improve this, the Rural Community Broadband Fund, a joint fund with Tees Valley, has been allocated £1m to address such problems, across Teesdale and Weardale.
184. Reference has also been made to the BDUK Superfast Extension programme which has been allocated £250m to extend fibre coverage across the UK and from which £3.9m had been allocated to the whole programme area (Durham and parts of Tees Valley), although this had to be match funded.
185. Concerns have been identified regarding new housing developments not having access to telephone/internet infrastructures and residents having to wait considerable time before this became available. This was of particular concern where developments consisted of “family

homes” and which relied on internet access to help with children’s schoolwork and also for those people who worked from home or were self-employed. It has been suggested that such consideration should be given for new residential, economic regeneration and commercial developments.

### The economic case for encouraging channel shift

186. In examining access channels and how the Council manages demand across the various channels, it is evident that face-to-face contact is the most costly followed by telephone and E-mail/web based contact. It therefore follows that in order to reduce the cost to the Council of customer services across these access channels would require a degree of channel shift from face-to-face/telephony to web based contact.
187. Durham County Council access channel costs are benchmarked against those gathered by the Society of Information Technology Management (SOCITM) and the table below sets out comparator figures across the main access channels.

Channel	DCC Cost	SOCITM Cost
Face to Face (CSA)	£5.29	£8.62
Face to Face (CSO)	£8.70	
Telephone (CSA)	£1.08	£2.83
Telephone (CSO)	£3.30	
Telephone (BECS Claims)	£3.61	
Telephone (Switchboard)	£0.18	
E-mail (CSA)	£1.81	
E-mail (CSO)	£3.30	
Web (CSA)	£1.81	£0.15
Web (CSO)	£3.30	

188. The DCC costs are based upon the member of staff dealing with the customer contact be that Customer Services Assistant; Customer Service Officer, Benefits/CT officer or switchboard. The costs reflect the length of time taken to deal with an issue, the complexity of the customer contact/enquiry and the staffing salary costs across the various disciplines.
189. The costs evidence the higher unit cost of the more popular and frequently used face to face and telephony access channels in comparison to internet/web-based channels that experience less demand fall below the customers' expectations.
190. When examining the costs it is evident that face to face unit cost for DCC (£8.70 CSA) compare favourably with the SOCITM benchmark and other councils (£8.62).
191. The unit cost for telephony is higher for DCC than SOCITM (£2.83) when customer enquiries necessitate the involvement of a CSO (£3.30) or BECS Claim (£3.61) handler due to the more technical knowledge of the subject matter being required.
192. The Council's E-mail and Web transactions' unit costs (£3.30 CSO and £1.81 CSA) are considerably higher than the SOCITM Unit cost (£0.15) because of the need to double handle enquiries and the need for manual intervention because of the shortcomings within the Council's existing CRM system and the wide variances and number of IT systems through which such enquiries are received.
193. Encouraging customers to access services through digital channels would reduce costs to the Council when compared with face to face. However, not all services are geared up to be accessible through e-mail and the Website and the Council is working to ensure that customer expectations with regard to digital transactions and enquiries are met.
194. The challenge facing the Council is therefore one of :-
- Ensuring that more Council services are accessible to customers via the website;
  - Encouraging customers to access services through the less costly Web-based channels;
  - Eliminating the need to double handle enquiries and manually intervene in E-mail and Web-based by investing in a suitable CRM platform that supports effective customer service delivery in a more timely manner;
  - Reducing the unit cost of the Council 's E-mail and Web transactions;

- Ensuring that only those customers that need the face to face or direct telephone contact with a CSA, CSO or BECS Claim handler use this access channel.

### Customer contact – changes in channel shift

195. An analysis of the use of access channels by customers has identified that this is shifting and that this can be facilitated by:-

- Reducing customer reliance on telephone enquiries;
- Reducing the need for customers to have face to face contact with the Council;
- Increasing and encouraging digital contact;
- Utilising online payments systems across Council services;
- Developing mobile solutions, and
- Combining access channels to facilitate the provision of a 24/7 customer service.

196. The Council has experienced significant access channel shift from 2011/12 to 2013-14 without systematically changing its focus corporately on how services are being offered to customers and how customers can do business with the Council.

Contact Channel	2011-12	2013-14
By Telephone	69%	34%
In Person	12%	9%
Website	3%	51%
E-mail	1%	2%
Auto Payment by Telephone	3%	2%
Payments via Website	12%	2%

197. Based upon existing service processes and projected channel shift, the Council could assume savings in the region of £800k by changing attitudes towards customer contact and improving and streamlining Customer service processes.

198. These savings could be increased by developing and implementing an assisted digital strategy which supported the delivery of the Customer First Strategy. This strategy should include an improved CRM system alongside an enhanced Council website which incorporates enhanced Web-based customer service functionality.

199. By encouraging customer service access via digital channels, this would also reduce the demand placed upon face to face and telephone

access and allow greater utilisation of Customer services staff within these access channels for those customers who require this enhanced degree of support and personal contact.

## Section 5 – Service Standards

200. The refreshed Customer First strategy identifies that the Council needs “to be clear about what standards of service customers can expect to receive from our staff when contacting the council.” In doing so the Council will “monitor our performance in relation to timeliness and quality of service and use this to make improvements where we can.”
201. The Customer First Strategy refresh includes the customer service standards and it aims to ensure that the council has a set of challenging standards within the resource capacity we have for all of our main services and that we successfully deliver against these standards.
202. There were a number of issues identified with the current service standards, the key ones being :-
- They only cover a limited number of council services and there are large parts of the council not reflected in the standards. A number of services have their own customer services standards.
  - They cover a limited number of access channels (telephone and face to face contact) with none for e-mail, letters or web-form or social media.
  - They concentrate on speed of response and do not reflect quality of response or customer satisfaction.
  - Since the standards were developed, the customer services function has taken responsibility for first line contact for revenues and benefits enquiries.
  - Public services including local authorities are facing unprecedented spending cuts. There is a drive for more efficient services and doing more with the same or less.
203. The Institute of Customer Services states that service standards are important for customers, potential customers, employees and management of a business. They help to define what a customer can expect and to remind management and employees of the challenge and obligations that they face.
204. Service standards have been defined as “a given level of desired performance or minimum level of acceptable performance status to be achieved or maintained” and “a public commitment to a measurable level of performance that clients can expect under normal circumstances”.

205. Research undertaken by Ipsos Mori on behalf of the Public services Trust and detailed within a report published entitled “What do people want, need and expect from public services?”, identified five key areas of importance for the public, namely:-

- The meaning of fairness, uniform standards, outcomes and help for those in legitimate need;
- Customer service standards;
- Local control,
- Accountability;
- Personalisation and choice.

206. This research suggests that people’s expectations of public service standards are often shaped by their experiences of customer service in the private sector, particularly in respect of quick response times, convenient ways of accessing services and higher service standards from private companies.

207. Five key factors were identified which drive customers’ satisfaction with public services: delivery, timeliness, information, professionalism and staff attitude. The following model identifies the relative relationship/importance between these drivers and the main elements within each.

Quantitative  
Qualitative

<b>DRIVER</b>	<b>MAIN ELEMENTS</b>	<b>IMPORTANCE (%)</b>
<b>DELIVERY</b>	The final outcome The way the service kept its promise The way the service handled any problems	30%
<b>TIMELINESS</b>	Initial wait How long it takes overall No. of times had to contact service	24%
<b>INFORMATION</b>	Accuracy Comprehensiveness Being kept informed about progress	18%
<b>PROFESSIONALISM</b>	Competent staff Being treated fairly Reliability	16%
<b>STAFF ATTITUDE</b>	Polite and friendly staff How sympathetic staff were to your needs	12%

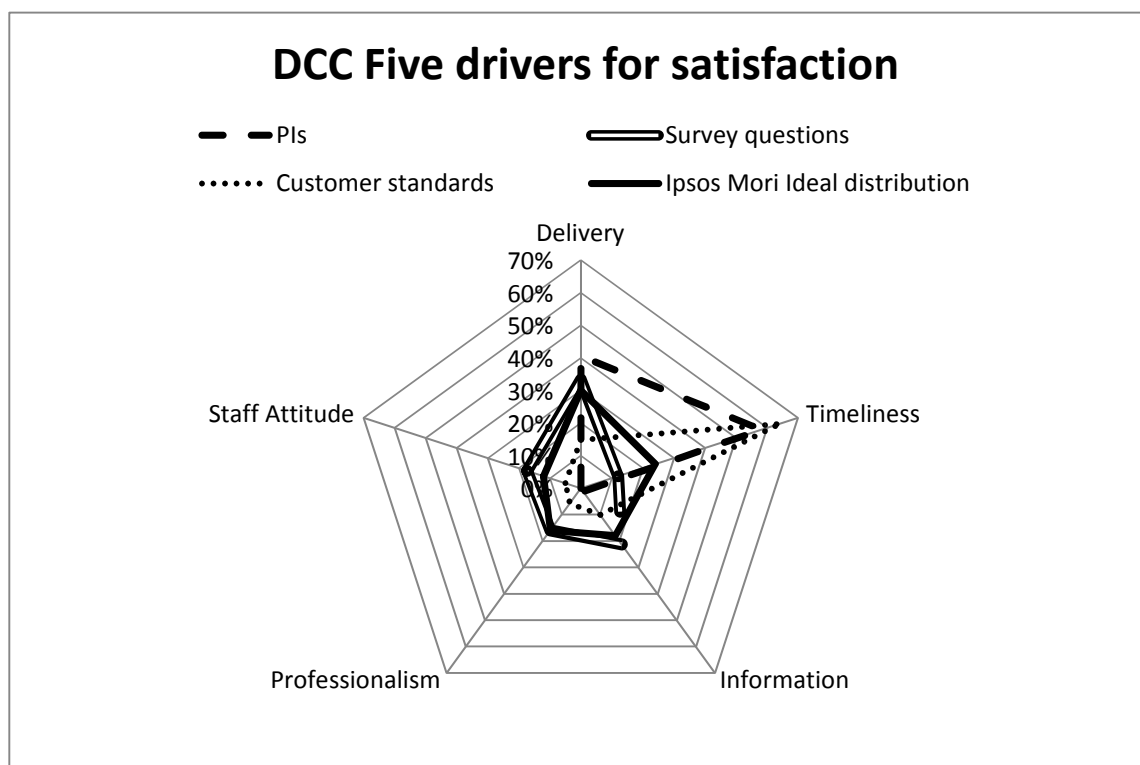
208. The drivers can be assessed as either quantitative or qualitative and the development of robust service standards within each will depend upon the relative mechanisms through which performance in each can be collected, analysed compared and assessed. In assessing customer satisfaction, the drivers were present when people were satisfied and absent when there was poor satisfaction.

209. The more quantitative drivers appear easier to measure and report than qualitative measures though they remain important to customers and so measures need to be developed and reported.

### **Customer standards**

210. The Council has initiated work to develop customer standards across all communication mediums (letters, emails, faxes or postings to social media sites such as Twitter and Facebook), services and also standard types (timeliness around initial contact; timeliness related to processes -benefits, highways repairs; Avoidable contact; service delivery, professionalism and staff attitude).
211. Based upon the key drivers of customer satisfaction identified by Ipsos Mori, the work has analysed the existing tools available to the Council to monitor customer satisfaction, namely Performance Indicators, Customer satisfaction Surveys and customer service standards.
212. In relation to the customer standards, three main areas where there are gaps are 'Information', 'Professionalism' and 'Staff attitude'. There are no quantitative service standards within the council for these and a small number of qualitative service standards (19, 11, 10) and a large proportion of these are not currently measured or monitored. The majority (121 or 64%) of our service standards relate to timeliness and are mostly quantitative. These are mainly around how quickly we answer telephones and correspondence, waiting times and assessment timescales. There are also a number of ones which could also be included in the delivery section around timescales for pest control and new bin delivery. 15% of the service standards related to delivery but they do not cover all services.
213. As the following table shows, some of the five drivers of customer satisfaction underpin a significant number of PIs, survey questions and customer standards, while other drivers are much less evident. Timeliness is well covered, as is delivery. 'Information' is much less well covered and professionalism and staff attitude have only slight coverage in the survey questions and customer standards, and are not reflected in the PIs. This indicates that our performance management framework needs to be amended to take more account of the five drivers. In particular, in order to get more balanced distribution of the five drivers to customer satisfaction, our standards, PIs and surveys should include reflect more of the 'information', 'professionalism' and 'staff attitude' drivers.





Services	Delivery	Timeliness	Information	Professionalism	Staff Attitude	Total
Mori ideal distribution	30%	24%	18%	16%	12%	100%
PIs	41% (32)	58% (46)	1%(1)	0% (0)	0%(0)	100% (79)
Survey questions	33% (25)	12% (9)	21% (16)	16% (12)	17% (13)	100% (75)
Customer standards	15% (28)	64% (121)	10% (19)	6% (11)	5% (10)	100% (189)
3 tools overall	25% (85)	51% (176)	10%(36)	7% (23)	7% (23)	100%(343)

214. Delivery, timeliness and to a certain extent, information, are measurable and are reflected in our performance indicators and standards. The customer perception of information, professionalism and staff attitude should be monitored through surveys and mystery shopping. Looking at all three tools used across the council shows that most of our effort is directed at determining timeliness performance.

215. One way to get closer to the Ipsos Mori's ideal distribution for five customer satisfaction drivers is to conduct regular satisfaction surveys in relation to customer services across the authority in order to improve our insight of customer perception of all five drivers but in particular, those qualitative aspects of service delivery.

## **Development of new service standards**

216. The development of new service standards across the five drivers for customer satisfaction also requires the establishment of performance measures across these standards.
217. Key principles for these service standards include:-
- A measureable time-based service standard is required for all of the Council's main access channels (telephone, face to face, letter, e-mail/web-form, social media) to ensure customers are aware of the timescale in which they can expect a response;
  - Any service standard/performance measure for telephone calls should apply to all publicised telephone numbers;
  - For face to face contact, service standards should measure the actual time a customer has waited to be seen by a CSO in a CAP;
  - Optimum service performance would identify a standard that aims to resolve customer queries at the first point of contact;
  - Performance standards should be established to measure the quality of the service received by the Customers – this can be achieved by utilising customer service feedback surveys;
  - Performance Indicators monitored via the corporate performance reporting process should be supplemented by an agreed basket of local indicators;
  - An agreed mechanism for utilising feedback received from customer standard/performance monitoring should be evident which demonstrates how customer learning is contributing to service improvement.
218. Upon completion of the ongoing customer standards work, the Council should consider how these standards and performance measures are consulted upon both internally with service groupings and elected members but also importantly with customers themselves.

## **Customer First Training**

219. The working group examined the extent to which Customer services training was provided across the Council's workforce and how this was used to reinforce the need for the development of customer standards and the monitoring of performance across these standards.
220. The Council offers a corporate Customer First Training course for all relevant staff and it is a mandatory training requirement for Customer

Services Advisors and Customer Services Officers. Its aim is to develop positive customer relationships, provide an excellent service and review opportunities for continuous improvement.

221. As part of the ongoing customer standards activity, an analysis has been undertaken to determine how the training delivers against the five key drivers for customer satisfaction and the results show that the training is primarily relevant to staff attitude, professionalism and information.
222. Staff attitude is dealt with in the training module by addressing how polite and friendly officers are to customers and how they listen and understand their needs. All of the areas of training are applicable to this from body language to telephone etiquette and dealing with difficult customers.
223. Professionalism relates to how reliable and competent staff are in doing their job and again the majority of areas in the training module are relevant to professionalism.
224. There are slightly fewer areas that relate to information and these are mainly around good communication skills, handling complaints and telephone/e-mail etiquette.
225. Timeliness is referenced in the e-mail and telephone etiquette element of the training.
226. In terms of delivery i.e. the final outcome the training does not appear to be directed at this area as it is mainly focussed on the initial contact. The table below highlights the key areas of training and relevance to the five drivers.

	<b>Del.</b>	<b>Time.</b>	<b>Info.</b>	<b>Prof.</b>	<b>Staff Att.</b>
Body language					✓
Good communications skills – empathy					✓
Good communication skills - courtesy					✓
Good communication skills - speak clearly					✓
Good communication skills - Good communication	✓		✓	✓	✓
Telephone etiquette		✓	✓	✓	✓

	Del.	Time.	Info.	Prof.	Staff Att.
E-mail etiquette		✓	✓	✓	✓
Dealing with Difficult customers				✓	✓
Handling customer complaints	✓		✓	✓	✓
Irate customers				✓	✓
Listening skills				✓	✓
Create the right first impression:				✓	✓
The Customer Interaction			✓	✓	✓

227. In supporting the development of systematic customer service training across all Council staff, including front line service staff, the task and finish group are keen that this also be offered to all Councillors.

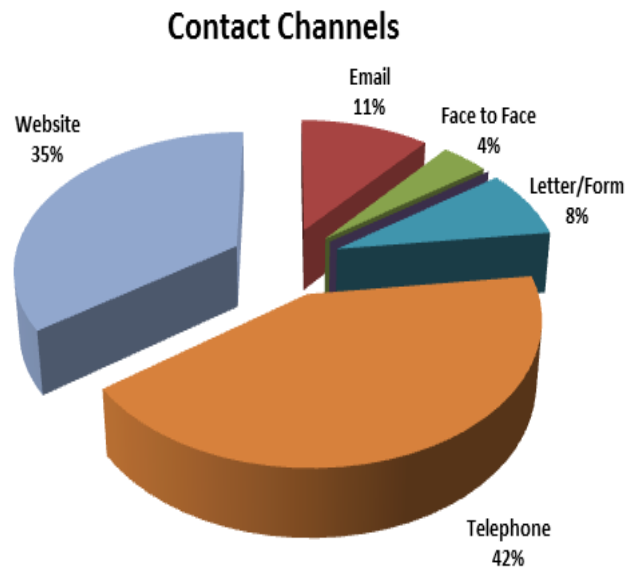
### **Mystery shopping**

228. Mystery shopping is a tool used to measure the performance of a service or organisation and gain an insight into the customer experience. It generally involves independent representatives contacting the relevant organisation seeking information or answers as if they were genuine customers. The feedback from this experience would then be recorded (and sometimes scored) with a view to making changes in the organisation to improve the customer experience.
229. When considering the work being undertaken across the Council in respect of the refresh of the Customer first strategy, the development of service standards across all services and the use of customer feedback to shape future service delivery and improve performance /customer satisfaction, the task and finish group support the use of mystery shopping as an excellent mechanism to obtain some feedback on the 'qualitative' aspect of the customer experience and to use this information to implement service improvements to benefit customers of the council.
230. The development of a potential "mystery shopping" proposal is being examined as part of customer standards work and the group would support this initiative, including the involvement of Councillors within such activity.

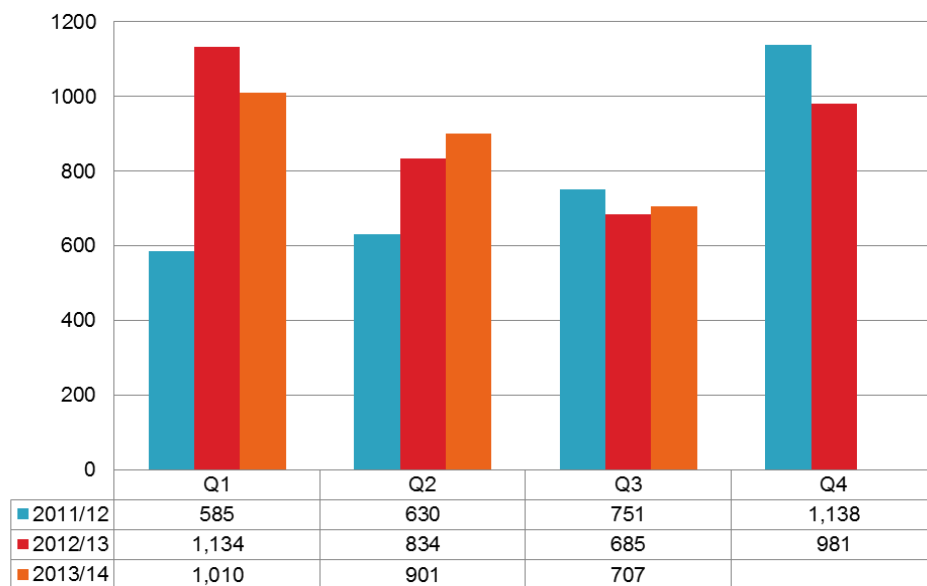
## Section 6 – Customer Learning

231. A key outcome within the Customer First Strategy is that “customer feedback informs learning and results in improved services”. In delivering against this outcome the Council is committed to:-
- Taking customer views into account when improving services;
  - Enabling customers to access their information securely online;
  - Using customer feedback to inform business planning;
  - Monitoring the equality impact of service changes and using that information for future service development;
  - Reviewing the way in which we deal with all customer feedback, including complaints, compliments and comments;
  - Telling customers when their feedback has been used to shape service provision through ‘you said, we did’ information.
232. The Council’s current corporate complaints policy defines a complaint as **“an expression of dissatisfaction about the standard of service or lack of action by the Council, its staff or contractors”**.
233. The corporate complaints procedures aim to:-
- recognise good service through the recording of compliments and acknowledge what the Council have done well;
  - drive the improvement of services we provide to customers by responding positively to comments, complaints and suggestions and, where appropriate, making changes to the way in which we deliver services;
  - promote a consistent approach to handling comments, complaints, compliments and suggestions that is easy for customers and staff to use.
234. In order to provide an open and accessible policy/procedure, a comment/complaint/compliment/suggestion can be received via any existing access channel e.g. verbally (face to face or telephone), written (letter, e-mail or on a pro-forma), web form etc.
235. As new access channels are developed and implemented customers will be able to log their comment /complaint / compliment / suggestion via these channels. As a result, in the future any employee should be able to record the necessary complaint details and pass them on to the Complaints Officer in the relevant Service Area or to Customer Services.
236. Communication is important and therefore help should be provided for those customers whose first language is not English or who may have difficulty in expressing themselves through disability and this should comply with the Council’s equality and diversity policy/standards.

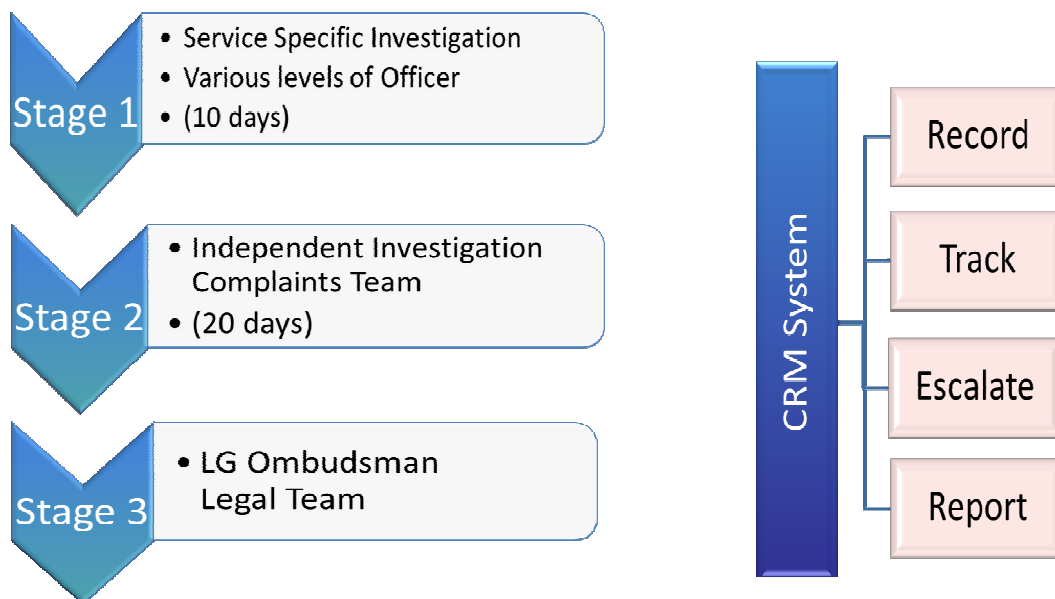
- 237. Members Support staff are trained to log complaints onto the Council's Customer Relationship Management (CRM) system on behalf of Members and will be responsible for communicating progress to the relevant Member/s. This team also deals with any complaints received from Members of Parliament.
- 238. Complaints received from Town and Parish Councils are handled via the same procedure as complaints from customers.
- 239. The current methods of receiving complaints via current access channels are:-



- 240. Since 2011, the number of complaints logged by the Council has increased. This can be seen in the following table.



- 241. The Council operates a 3 stage complaints process.



242. 98% of the complaints received into the Council in 2012/13 were resolved within stage 1 and 2 of the process without the need for escalation to the Local Government Ombudsman.
243. Within the complaints process, it is essential that the CRM system is fit for purpose and provides the appropriate functionality to support staff in recording, tracking, escalating and reporting upon all issues raised including complaints, compliments, requests for services and suggestions. The system should also do this instantaneously to enable all relevant officers to have access to the most up to date information regarding the status of the issue.
244. The reasons why the complaints have been made are:-

Administration	3%
Communication	4%
Council Policy	5%
Environmental Impact	2%
Planning	1%
Quality of Service	15%
Service Failure	61%
Speed of Delivery	2%
Staff Attitude	7%

245. To enable the Council to adopt a systematic approach across all services in responding to customer feedback, a customer experience model was developed in 2012.

246. The model uses feedback and information from service demand statistics, complaints, suggestions, compliments, the “customer journey” and survey results to produce a customer experience report. This report is considered at a customer experience meeting involving key stakeholders within the Council including customer services representatives and service groupings to ascertain key messages and findings which, in turn, are developed into an improvement programme of activity.
247. The Council has used the customer experience model to develop and introduce a number of service improvements such as:-
- New “repeat missed container” monitoring process, reducing repeat missed bin complaints.
  - New process for requests for sand bags, including through the website.
  - Agreed approach to manage enquiries and complaints in relation to the street lighting energy reduction project.
  - Updated staff training and guidance manuals for refuse and recycling.
  - Establishment of a missing address data process in the CRM to enable customer requests to be processed consistently whilst the address file is updated.
248. Members of the Working Group consider that officers should examine the most frequently occurring complaints received by elected members from their constituents as these may collectively identify service failures. A survey amongst members or a facility whereby this information is gathered on a regular basis is suggested.
249. Members are also mindful that where an increase in complaints around a particular service reflect an agreed change in council policy/service delivery methodology, this would be reduced by ensuring that any such changes are preceded by a robust and widespread communications plan to include leafleting/use of Durham County News.
250. Members referenced the Council’s revised Tree Management Policy as an example where proactive information sharing to residents alongside the emerging policy helped to ensure that the communities of County Durham were clear about the new policy.



## Section 7 – Site Visit to Sunderland City Council

251. A key requirement built into the terms of reference and methodology for the Review is the need to examine corporate customer standards in comparison to standards set in other local authorities/ organisations. The review has considered what good practice might look like and particularly what we can learn from others.
252. In 2011, Sunderland City Council embarked upon a process to develop a Customer Access Strategy which set out its plans to further develop and improve customer service across the council. To help develop the Strategy and understand people's experiences, expectations and preferences when contacting the council, the City Council undertook workshops and a survey during May to July 2011.
253. Key learning from the workshops and survey undertaken by Sunderland was used to inform its Customer Access Strategy. The Strategy includes a set of four principles which address aspects raised in the consultation, namely :-
- Accessibility - One size does not fit all - we will always respect customers' desire for choice in the way they prefer to access services so we don't exclude or unfairly disadvantage anybody;
  - Consistency - Regardless of how, when and where a customer contacts the council, the experience should always be the same - a person who wants to request the removal of litter, for example, should be told how and when their request will be fulfilled, be given the same information and be treated with the same respect regardless of whether they telephone, visit the council's web-site or visit a customer service centre;
  - High quality - Every service promise should be fulfilled - the way each contact is handled should be efficient but courteous, gather all the necessary information from the customer, and give all necessary information to the customer. Wherever possible, the customer's needs should be fulfilled at the first point of contact. All requests for service should be delivered on time and to expectation;
  - Value for Money - Every contact should provide value for money whilst not compromising any of the above principles.
254. The feedback from Customers has also been used to directly influence service provision across access channels, making them more effective, responsive and user friendly.
255. The development of the City Council's Customer Access strategy required a shift in organisational culture from the top down. The Chief Executive led the development of the strategy and ensured that strategic leadership from the Council's Executive management team

flowed through the Council's staffing structure, across all services and resulted in a corporate customer service and access ethos which was developed and nurtured. The change programme also received very strong political support from the Leader of the Council and the Portfolio Holder for Responsive Services and Customer Care.

### **Telephone contact**

256. The key change implemented within Sunderland has been the rationalisation of Council telephone numbers to a much smaller set of numbers, each covering a grouping of services. These groupings are designed to help customers decide which number is the most appropriate for the service they require. Continuous monitoring of the usage of the numbers is undertaken to ensure they are meeting customer's needs
257. The use of automated telephone services where appropriate, similar to automated payments facilities are promoted. Such systems have been carefully designed to ensure excellent usability and address the feedback received in the consultation including the desire to always have the option of speaking to a 'real person'.
258. Text and email alerts have been introduced to those customers who wish to receive them to provide information such as e.g. school closures, changes to bin collection rounds, reminders of appointments.
259. The Council has also replaced background music when customers are queuing on the telephone with the provision of useful information about forthcoming events and Council services.

### **Improvements to the Sunderland City Council website**

260. A range of improvements to the Sunderland City Council's website have been implemented which included updating and improving content and making it easier to navigate and search for information.
261. It also included creating the facility to make online payments for services.
262. More online transactional services have been developed such as reporting graffiti, requesting a collection for large items and applying for a blue car badge. This process has also included the ability for customers to track services and receive updates. The security of these services is robust.

### **Customer service centres**

263. Sunderland City Council have reviewed their Customer service centre provision. The Council's Customer Contact Centre has relocated from Doxford Park into the Civic Centre Sunderland.

264. Face to Face customer services are available in a number of Customer Service Centres throughout the City. There are full time presences at Fawcett St, Southwick, Houghton, Highfield and Washington. Freephone access to services and appointment services offered at all points.
265. A hub and spoke approach has been adopted by the City Council with each area of the city having a well-recognised Customer Services community “hub,” complemented by “spokes” of offerings in additional council / partner locations.
266. Key principles adopted in respect of contact at Customer service centres include:
- The availability of both drop in and appointment based services;
  - Customers’ desire for confidentiality and privacy will always be respected;
  - Staff will wear appropriate uniforms and name badges, and offer a courteous, professional service at all times
  - Telephones are available for customers to speak, free of charge, to specialists within services where such assistance is required;
  - Computing facilities are available to allow customers to access services via the City Council’s website and staff will offer assistance and encouragement to customers who are willing to use them.
267. The City Council has adopted a “service pyramid “model for customer service enquiries which empowers Customer services staff to deal with queries at the first point of contact. This means that customers are only dealing with professional staff for those parts of the customer journey where it is essential and that service specific expertise is required.

### **Keeping a record of interactions and sharing information**

268. During 2011 Sunderland City Council launched the ‘Tell Us Once’ Birth and Bereavement services. This means that when you register a birth or death of a loved one, upon request this information can be shared across council and government departments on your behalf. Customers are always asked if they want to take-up this service and customer services will only share information if the service is taken up.
269. A Customer Contact System has been introduced which manages the way the Council delivers services and allows it to record, track and monitor requests for services. The system also allows the delivery of several council services during one interaction, for example, a customer moving house may want to register for Council Tax and on the Electoral Roll and find out about their bin collection days and local leisure facilities.

## **Promoting how to access services**

270. Following customer feedback the City Council updated its 'contact us' web pages and some of our leaflets and information. They also included a 'contact us' section in the City Council's Community News publication which goes to every household. This includes details of direct telephone numbers for council services and local Customer Service Centres.

## **Grouping council services**

271. Customer feedback and engagement highlighted the need for the City Council to reduce the number of telephone numbers available through which to contact the council. Customers also raised concerns about not knowing who to contact and difficulties in getting through to the right department.
272. The following service groupings were agreed and descriptors/examples of services within the groupings included within customer service information to assist customers identify which number to call.

### **City and neighbourhood - Telephone: 0191 520 5550**

Help with enquiries such as waste and recycling, parks, highways, parking, licensing, pest control, community safety, elections and visitor information.

### **Home and money - Telephone: 0191 520 5551**

Help with enquiries such as council tax, housing and housing advice, planning and building control, and welfare rights advice.

### **Health and wellbeing - Telephone: 0191 520 5552**

Help with enquiries such as social care and concern for welfare, disabled parking badges, concessionary travel passes, and sport and leisure.

### **Life, family and learning - Telephone: 0191 520 5553**

Help with enquiries such as education, families' information, fostering and adoption, youth services, births, deaths, marriages, civil partnerships and libraries.

### **Business services - Telephone: 0191 520 5554**

Help with business enquiries such as business rates, business investment and business advice.

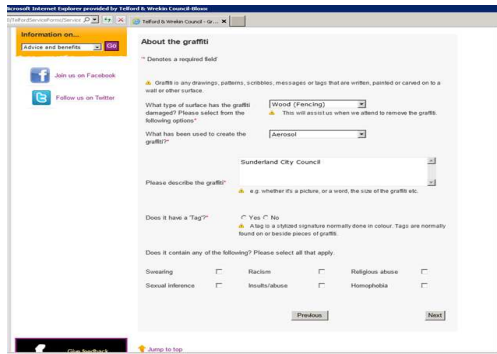
## **Council switchboard - Telephone: 0191 520 5555**

Use the switchboard if you know the name of the person you wish to speak to.

### **Enhanced customer services via digital channels**

273. As part of the customer engagement process during the development of the City Council's Customer Access strategy, 80% of survey respondents indicated that they use the internet and 75% had used the council's website within the last year, mainly to find information.
274. Two thirds of survey respondents considered easy navigation and good search facilities to be among the most important features of the Council's website.
275. In examining the potential take up of customer services via digital channels, it was established that 9 out of 10 adults in Sunderland have a mobile phone and internet usage rates within the city Council's area was 28% compared to just 18% nationally. It was therefore evident that there existed an identifiable customer base via these channels utilising mobile/smart phones, mobile tablets and PCs.
276. An overarching digital strategy has been developed by Sunderland City Council's communications team which:-
- Makes all service information and guidance available via [www.sunderland.gov.uk](http://www.sunderland.gov.uk)
  - Designed transactional services that are easy to use, reliable and provide reassurance to customers in respect of security and what response they can expect;
  - Explored the use of mobile applications and digital TV (although the latter has proven to be little used by customers).

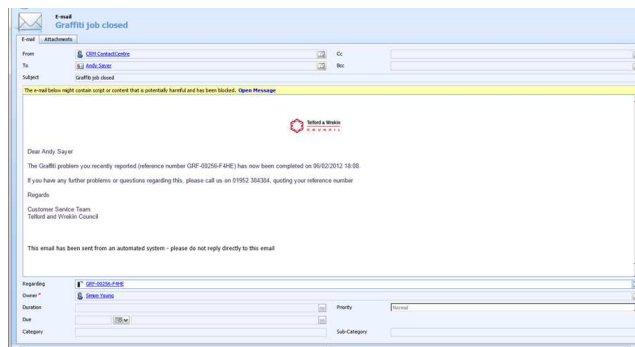
### **How it works**



Customer logs service request via Website



Service request received by operatives



Recognition for action, job completed...customer receives thanks and notification via email.

277. The City Council has also introduced SMS services for Customers who have requested information or services via their smartphone, tablet or where a mobile telephone number has been provided by them. Examples include:-

“Sunderland City Council - thank you for requesting a special collection for Friday 16th March. Please do not forget to place your mattress at the usual collection point before 8am”

“Sunderland City Council – thank you for contacting us, your appointment with Jane Smith, Social Worker will take place on Friday 16<sup>th</sup> March at 2.00pm”

278. In adopting these approaches, the City Council has ensured that it is addressing the principles identified by the Customers that by fostering this idea of the customer promise, the Council gives the customer at the end of every encounter a specific undertaking about what will happen next and gives a timescale.

## Section 8 – Conclusions and Recommendations

279. The Council's Customer First strategy has been updated to reflect those key messages received as part of the consultation including improving ease of contact for customers and getting it right first time. The strategy commits to improving clarity for customers on how they can expect services to be delivered and to be kept informed of progress. Choice of access channels is reflected in the strategy together with ensuring that a "personal touch" approach is adopted and on-line payment facilities are easier and secure.
280. A number of key projects are being driven within the Council by the Customer First board and which are deemed to be business critical to the Council in delivering against the refreshed Customer First Strategy.
281. The ongoing project work in developing and improving key ICT infrastructures including the delivery of a fit for purpose Customer Relationship Management system as well as an improved website with excellent functionality across all services will deliver significant potential improvements across services. This will contribute to the stated aims of:-
- Providing a range of effective and easy to use ways in which our customers can deal with us;
  - Delivering responsive and customer focussed services, and
  - Ensuring that customer feedback informs learning and results in improved services.
282. These projects will also shape the considerable work being undertaken to develop a suite of customer standards and associated performance measures across all services through which the Council will learn from customer experience and utilise this feedback to further improve service delivery.
283. The proactive decisions by the Council to build on the existing channel shift being demonstrated by customers in doing business with the Council, utilising digital/e-enabled service delivery at a lower unit cost to the Council will continue to contribute to the Council's drive for greater efficiencies against continued funding pressure for Central Government.
284. These efficiencies will be further enhanced through the implementation the previously agreed Office Accommodation strategy in respect of Customer Access Point development and the introduction of an enhanced "Information Durham" service provision and branding.

## Recommendations

285. Consideration of the review's findings has led the task and finish group to make the following recommendations:-

- (i) That Cabinet consider as part of the implementation of the refreshed Customer First Strategy, that Customer services training be provided across all Council services as part of the Corporate Training programme, such training to be prioritised to cover all customer facing service provision and also to be offered to all Councillors.
- (ii) That the Cabinet monitor the implementation and benefits of the new CRM system currently being procured in supporting the delivery of the Customer First Strategy;
- (iii) That Cabinet seeks to ensure that the provision of broadband/digital service connectivity in respect of new residential, business and commercial developments is encouraged;
- (iv) That the Cabinet ensures that a focussed and structured plan for the delivery of the customer first strategy is in place which provides clarity on how those business critical projects identified within this report will be delivered including proposed timelines and delivery milestones;
- (v) That Cabinet supports the rationalisation of the Council's telephone numbers that are promoted and advertised to a small series of golden numbers that are easily recognised and accessible by customers;
- (vi) That the Cabinet recognises the need for Customer Access Point provision to be supported by the emerging "Information Durham" service provision that is suitably branded, easily identifiable and delivered through as wide a network of facilities and locations as possible, including partner organisations, community facilities and third sector organisations with robust support from the Council's ICT service;
- (vii) That the Cabinet supports the ongoing development work on the Council's website and that all services commit to provide enhanced service information which will reduce avoidable contact and promote online transactions as part of a structured plan to promote channel shift;
- (viii) That the Cabinet supports the work of Customer services and the Corporate news team to review social media as a customer services channel and to pilot ideas on how this could work;



- (ix) That the Cabinet supports the ongoing project work to develop services standards and associated performance management arrangements across all services and, upon completion of this work, all stakeholders including the public, council staff and Councillors will be engaged upon the proposed services standards;
- (x) That the Council support the development of mystery shopping for use as part of service standard performance management arrangements and that any such proposal include the input/involvement of Councillors.

286. It is further recommended that a systematic review of the report and progress made against recommendations should be undertaken after consideration of this report by Cabinet, within six months.