

Review of Customer Experience in Mid Devon District Council

July 2020

A review by a Working Group of the Scrutiny Committee.

(Please note - the research, site visits and majority of meetings for this Working Group took place before the Government imposed restrictions due to Covid-19. The customer experience during the Coronavirus pandemic has not been a part of this review).

Contents

Introduction	3
Rationale for the review.....	3
Scope	3
Methodology and Approach	4
The Customer Experience.....	5
Customer Services Department	5
Site visits to other Back Offices	8
North Devon District Council	10
Conclusions.....	10
Recommendations	11

Introduction

Local Government continues to face growing pressure on resources, with a need to focus on efficiency and value for money. At the same time, however, customers expect a high quality service when dealing with their Local Authority. Balancing the complex nature of Council's and the range of departments, with provision of a seamless service on a tight budget can be challenging.

This report examines customer interaction with Mid Devon District Council. Through multiple site visits, analysis of data and evidence, and feedback from Members and residents, the Working Group has considered the full customer experience when they get in touch for any service with the Council.

Rationale for the review

Improving and delivering a positive customer experience is a priority for the Council. Members had been made aware by residents of issues or failures in communication between departments/systems and members of the public reporting issues. Members of the public reported that occasionally requests were not resolved or no feedback given to keep them informed of progress, resulting in repeat follow up calls to the Council. The Scrutiny Committee agreed that a Working Group on Customer Experience could help improve systems and response times.

Scope

The Working Group agreed that the following scope would form the Review:

"To review the customer experience, and how the Council's systems work, to understand if they are effective and delivering a positive and efficient service.

To understand the customer experience across multiple channels and services in order to improve systems and reduce response times (whilst considering cost implications). Including understanding/improving:

- Customer Relationship Management system process for logging complaints and service requests;
- Customer Services handling of service requests and complaints, including volume and response times;
- Individual Departments systems for handling service requests and complaints;
- Systems for communication between the service areas and the customer service teams, to monitor whether enquiries have been dealt with and avoid duplication of work;
- Limitations of data sharing;
- Communication of feedback, including positive feedback and compliments;
- Handling of, and response to, issues where there is a dispute of ownership or no clear understanding of which organisation is responsible;
- Access to, and ease of use of, digital services and ICT to understand how technology is improving the customer experience; and
- Review of attitudes towards customers and the culture around the customer experience."

Methodology and Approach

Members of the Working Group were agreed by the Scrutiny Committee as:

Cllr Richard Chesterton;

Cllr Chris Daw;

Cllr Irene Hill; and

Cllr Barry Warren.

The first meeting of the Working Group took place on 01 October 2019, during which Cllr Chris Daw was elected Chairman. Subsequent meetings took place on 29 October 2019, 26 November 2019, and remotely on 22 May 2020. Cllr Frank Letch, Chairman of the Scrutiny Committee, observed all meetings of the Group.

Members were clear from the outset that in order to improve the customer experience, the customer journey across all channels and products must be understood. A focus on identifying and understanding the customer journey – the end to end experience that customers have with the Council – was a priority.

Members therefore undertook site visits to a number of Departments to ensure that enquiries could be followed from initial point of contact (Customer Services) to other Departments. During a site visit, Members would observe and participate in following a customer enquiry from beginning to end, and see systems in action. Site visits took place to the following Departments:

- Customer Services;
- Housing Department;
- Planning Department;
- Building Services;
- Property Services;
- Waste Department;
- Street Scene;
- Public Health and Regulatory Services;
- IT Department; and
- Exe Valley and Lords Meadow Leisure Centres

Members also questioned Officers as part of their Working Group meetings, as well as reviewing performance reports, complaints reports and other data available.

Members agreed that it would be useful for to have a comparable look at systems in other Local Authorities. After desk based research, North Devon District Council (NDDC) invited Members of the Working Group to carry out a site visit to see their system (Firmstep) in action. Given the situation with Covid-19, however, the visit was cancelled and could not subsequently take place. Claire Holm, Customer and Corporate Communications Manager at NDDC, kindly joined the Members of the Working Group at their remote meeting on the 22 May 2020 to give an overview of the system at NDDC and take questions from Members.

Please note: The research, site visits and most meetings for this Working Group took place before the Government imposed restrictions due to Covid-19. The customer experience during the Coronavirus pandemic has not been a part of this review.

The Customer Experience

The Council aims to put the customer at the heart of everything it does. It strives to ensure that all sections of the community accessing the Council's services will experience consistently excellent customer service. The Council clearly sets out how the customer can expect to interact with the Council in its Customer Care Policy 2018. This includes Customer Service Targets for interactions with Council, and a Customer Service Charter which details the standards that customers can expect.

The Council receives contact from customers in a variety of ways for all services. The table below shows the overall number of contacts for each method for 2018/19 and annualized for 2019/20 (please note, the annualized figures below do not take into consideration any changes that might have occurred due to the Covid-19 lockdown).

	18/19	Actual 2019/20 (April January)	to 19/20 Annualized	Comment
Visitors to our offices	23,078	12,360	14,832	36% Decrease
Number of Calls	135,809	95,552	114,662	16% Decrease
Print Requests	207	250	300	45% Increase
Items of post Despatched	162,625	121,152	145,382	11% Decrease
Kiosk Payments – Cash (self Service)	4980	8,174	9,809	97% Increase
Kiosk Payments – Card	4770	8175	9,810	106% Increase
Payments Via website (including online forms)	25994	25524	30,629	18% Increase
Phone Payments (automated)	17,070	16,118	19,342	13% Increase
Post Office	29179	26306	31,567	8% Increase
Payments Post (cheque)	5,110	830	996	81% Decrease
Scanning at post opening	30975	28657	34,388	11% Increase
Emails received via Customer Services	14,165	13,007	15,608	10% Increase

Data shows that the proportion of people self-serving has risen and that visitors to Council offices have decreased by 36%. The number of phone calls is also decreasing, and kiosk payments, online payments and automated payments are continuing to rise.

Customer Services Department

Unless self-serving online, the first point of contact for a customer contacting most Council services will be with a Customer Service Officer. Customer Service Officers assist members of the public by providing information or solving problems they may be experiencing with the Council's services and procedures. They will ascertain the reason for the customer's contact with the Council together with its urgency and record

the transaction on the Council's Customer Relationship Management (CRM) system, or other corporate IT systems.

Customer Service Officers deal with all aspect of the Council's services and procedures including:

- Providing a central call centre for the Council, dealing with enquiries for all services and providing a switchboard facility for services outside of Customer Service;
- Responding to emails sent to Customer Service, logging requests for service or forwarding on to relevant service areas;
- Processing online forms;
- Manning the reception at Phoenix House and greeting all customers; and
- Acting as the first point of contact for customers and aiming to resolve 80% of all initial enquiries at that first point of contact.

Customer Services Department Site Visit

Site visits to, and resident feedback on, Customer Services has highlighted that the first point of contact for members of the public (both in person and on the phone) is very professional and helpful. Staff are friendly and engaged, and go out of their way to ensure enquiries are handled as efficiently as possible. Customer Services should be congratulated for its excellent service.

It was apparent, however, that the system does not always enable Customer Services to know if an issue or complaint has already been dealt with, or which member of staff it has been passed to. During the visit, Members observed first-hand the difficulties with linking to other back offices. One customer had to be put through three times to one Department before getting to speak to someone who could assist them. Links to other systems in the Council are poor, which can result in duplication of work or confusion around how an issue is being taken forward.

Members also witnessed, and have heard reports of, long waiting times on the phone. One Councillor reported that after 11 minutes, he was still only third in the queue to speak to Customer Services.

Waiting times: (19/20 April-Jan)

Customer Services records waiting times for people making telephone calls to the Switchboard and for visitors coming to reception at Phoenix House. The following are waiting times for April-Jan 2019/20:

Telephone calls to Customer Services:

The Council's performance target is that 80% of calls to Customer Services will be answered within 2 minutes, this is currently at 56%.

The average wait time for this year is 03.56 minutes.

Face to face visitors to reception:

The Council's performance target is that 85% of visitors to reception are seen within 15 minutes, the figures show that the Council is currently seeing 94% of those within this time.

The average wait time for visitors to reception in 2019/20 is 10 minutes.

The average wait and serve time is 16 minutes.

Members discussed phone waiting times with the Customer Service Manager. Members were informed that since the new phone system was introduced in April 2019 there have been a number of issues which have impacted on wait times. Reporting shows that it now takes longer to answer a call because a customer will hear corporate messaging on the system. 58 seconds of the wait time is actually taken up by the messaging system. This was not previously recorded in the wait time and cuts the actual wait time down considerably.

The introduction of the new phone system also meant that some time was needed to bed in the new system and for training of staff to take place. Additionally, Customer Services has for a number of months carried vacancies which have been hard to fill. The need for a more generic team has also meant that there has been a focus on training staff to deal with calls for Council Tax and repairs, this has meant staff have come off the phones. All of which has contributed to longer waiting times for customers and impacted on the service provided.

Customer Service Conclusions

Customer Service officers are doing an excellent job of serving customers and providing a professional and friendly service, both face to face and on the phone. It is clear, however, that issues arise when Customer Service need to engage with other back offices as they cannot always see what action has been taken or who to put a call through to. The current system appears to be letting customers down as Customer Services are not receiving sufficient information on what has happened with an enquiry so they can know how to respond to a call.

Additionally, average waiting times on the phone are too long. Even if the 58 seconds of messaging is removed from the wait time, the wait time target on the phone would still not be met. Although a new way of logging wait times may be needed, Customer Services should continue to review the reasons for this Service Level agreement being missed to ensure targets for waiting times are met.

Site visits to other Back Offices

Housing Department Site Visit

Members observed the system in the Housing Department and agreed that there is a good system in place to deal with customer enquiries and engage with some service partners. In particular, for example, the homeless section has good links to other partners, notably the Churches Housing Action Team (CHAT) and this ensures cases are being coordinated well. There is a good feedback system with CHAT so Officers are clear on what actions have been taken and by who.

Again, however, site visits highlighted that the links between Departments in other areas appear to be poor. For example, the system linking housing and repairs does not make it clear what action has been taken with an enquiry or complaint. This means that enquiries can be hard to follow up, or satisfactory feedback is not given to customers.

Housing conclusions

Members heard from officers that there is a robust system in place for housing repairs. Diagnostic tools are used to identify whether repairs are urgent, and there is an effective out of hour's service.

The links and communication between the housing system and the repairs system, however, could be improved. Housing officers have informed Members that they often are not updated by the responsive repairs team and vice versa. The Working Group heard from the Group Manager for Business Transformation and Customer Engagement that the systems should be able to link better and could be designed so that outcomes are more clearly visible. The tenancy team, for example, should be able to see the repairs booked against a property. This therefore could potentially be addressed through adjusting settings or providing further training to staff on how to fully use the system.

Planning Department Site Visit

Upon visiting the Planning Department it became clear to Members that there are some ongoing staffing issues. For example, officers are expected to answer calls as and when, interrupting other work and not allowing dedicated time to focus on it. Staff talked about previously trialling having a dedicated officer to answer the phones, which worked well and left officers free to do other work.

Planning conclusions

Members reviewed planning performance, and assessed the rates at which applications are being processed. Application determination performance results indicate that the national planning performance indicators continue to be met and exceeded by the service in most areas and these indicators show improvement. There is though continued heavy reliance upon the agreement of extensions of time with the applicant. There is provision for such agreements in accordance with Government methodology on calculating performance.

Consideration of re-establishing a phone system in the office could help free up capacity so that officers can focus on more complex applications.

Public Health and Regulatory Services

The site visit to Public Health and Regulatory Services showed that there are also a number of issues with the system, as it does not clearly provide a process for following up enquiries and providing feedback. Members were impressed, however, that in order get around this, a leaflet had been produced for staff that clearly sets out how to handle customer enquiries. The leaflet makes the process clear - all enquiries are sent to the appropriate person and the Manager is informed. The Manager then monitors when and who actions the enquiry and how feedback is given. This innovative approach, in order to make the process clear for all staff, has improved the service given to customers.

Other site visits

During other site visits a number of issues already mentioned during this report were also seen. For example, in Building Services and Property Services it appears that the system has capacity for improved and increased usage. The system in Property Services does not enable officers to see how complaints reported to Customer Services have been dealt with – i.e. who has lead on a complaint, whether or where it has been passed on to, or if the job has been completed or any feedback given. Again, staff felt that they could benefit from training on the system to fully understand how to use it to its full capacity.

Members visited both Exe Valley and Lords Meadow Leisure Centres. On the whole it was felt that the process for customer complaints and feedback is clear, cards are completed and handed to reception. Complaints and comments are then logged and dealt with. There is not a system, however, to see if there is more than one complaint about the same issue, and the system does not interact with the Council's central system. However, at Lords Meadow the customer feedback box is not very visible and only two feedback forms have been received since April 2019.

The Revenues and Benefits Service has recently introduced a citizen access service which will give customers the ability to view their outstanding balances, Council Tax bill and any reductions they are entitled to. It is hoped that this new system will improve customer access, reduce the forms needing completion, and remove an element of duplication from the revenues staff. This system does not integrate with the current CRM system, but should improve customer experience.

Members felt that the visit to the Waste Department was useful and that the system is working well.

North Devon District Council

At the meeting of the Working Group on 22 May 2020, Claire Holm, Customer and Corporate Communications Manager at North Devon District Council (NDDC) outlined the key benefits and processes for the Council transferring to Firmstep, a CRM system used by a number of public sector organisations. Firmstep can help organisations shift processes from standardised and manual to online and automatic.

Members heard that the system has transformed the way NDDC deals with customers. The NDDC Customer and Corporate Communications Manager clearly explained the routes for integration with back office systems, and how that leaves a footprint for Customer Service advisers to see how an enquiry is being dealt with, and interrogate the back office system if required. This has meant that Customer Service staff are able to deal with more enquiries in the first instance, thereby creating a more efficient service and freeing up back office staff to deal with more complex customer enquiries.

NDDC have not fully completed integration into all back offices, but once they have they hope to provide 'an amazon style' service – i.e. everything will be done through one account, including logging queries and tracking them.

Members heard about the costs involved, both financially (which NDDC felt was very good value for money) and in terms of staff training, but it was clear that the system has transformed the customer experience and has provided increased officer capacity. NDDC has also seen increased applications to services like garden waste, also increasing the amount of revenue brought in to the Council.

The NDDC Customer and Corporate Communications Manager also made it clear to Members that technology can only go so far, and that a cultural shift is also required in order to ensure that systems are used to full capacity and redesigned with the customer in mind. At NDDC they have sent 30 members of staff on Vanguard training to fully understand how to improve systems for the customer and how to design the service around what customers want. This has really made a difference to how the system works. Customer Service staff are also trained across all areas and services of the Council over 6-9 months.

Conclusion

Mid Devon District Council is committed to ensuring that customer service excellence is an integral part of the planning, resourcing and delivery of all services. Through the Customer Care Policy 2018, in conjunction with other policies, the Council strives to ensure that all sections of the community accessing services will experience consistently excellent customer service.

It is clear from this review, however, that the current CRM system is outdated and not meeting the needs of customers. Customers are being let down because the technology does not enable Customer Service officers to seamlessly follow up enquiries or provide customers with the information they require. Customers are having to repeatedly call for information and feedback on actions taken can be difficult to obtain. The system works better in some services (e.g. repairs) than others, and the Council Tax system has also been improved with the new citizen's access system

(although this system is not integrated with the CRM). Replacing the CRM would enable all systems and services to be improved. Customers could then receive a timely response and/or satisfactory resolution in the first instance, which would ensure an efficient service that could save officer time. North Devon District Council were clear about the benefits a new CRM system like Firmstep would bring – both to the service provided to the customer, and to efficiencies within the Council by freeing up officer capacity. A digital transformation in Mid Devon District Council would ensure processes are streamlined and customers are being fully and effectively served.

Alongside any new system, the Council would also benefit from reviewing how services are designed and the processes that are used, to ensure they are built with the customer need at the centre.

Staff should be congratulated, despite systems pitfalls, staff are using innovation to get round some of the technological issues that they are faced with. Customer Services is excellent and deliver a first class service to customers of the Council. A customer focussed business culture could help ensure customers are satisfied and getting the best experience possible. The Council may benefit from training (from Top Management down) to fully understand how to make systems work for the customer first and foremost.

This review ultimately considered the customer experience with the Council, and Members therefore regularly drew upon their interactions with their own constituents and feedback they had been given on customer experiences. As part of this review, all Members of the Council were also asked for their input regarding issues that residents were raising with them in their Wards. Members, however, felt that the Council may benefit from a fuller understanding of customer satisfaction. As a result, Members of the Working Group have recommended that a survey is carried out with members of the public regarding their experience as customers of the Council. Results will be considered by the Working Group when available. Given the current circumstances with Covid-19, this should be considered once capacity and resources are available to facilitate it effectively.

Recommendations

1. That a business case for a new Customer Relationship Management (CRM) system to replace the existing technology is developed and considered by Cabinet. That any new system be designed with customer need at the centre of the process.
2. That systems work to full capacity and meet the needs of the customer first and foremost. Back offices should carry out service reviews and review business processes to ensure they are customer focused.
3. To ensure customers are at the heart of the Council, a customer focused culture should be promoted across the whole organisation - for all staff from the top down. This could include training (for Leadership Team, Officers and Members), Members/staff workshops or the use of advocates/case studies to promote a new system.

4. That a customer survey is carried out with members of the public regarding their experience and satisfaction as customers of the Council. Results are reported back to the Working Group when available.
5. That the Planning Department consider re-establishing a dedicated phone answering system, to ensure officers have capacity to focus on applications.
6. That the phone waiting times are reduced. A review of why the Service Level Agreement is not being met is carried out.