

SCRUTINY
19 APRIL 2021

SCRUTINY UPDATE – CUSTOMER SERVICE IMPROVEMENT PROGRAMME

Cabinet Member(s): Cllr Nikki Woollatt
Responsible Officer: Corporate Manager for Digital Transformation & Customer Engagement

Reason for Report: The purpose of the report is to provide Scrutiny with an update of planning for activities relating to a series of recommendations made by the committee in 2020.

Recommendation: To note the update and outline programme plan.

Financial Implications: Budget implications relate to capital and revenue for some of the projects identified in the programme. Funding will be dealt with via separate business cases and within council budget setting processes.

Budget and Policy Framework: This report sits within the current budget and policy framework.

Legal Implications: To ensure that all Customer Service in the council is able support all members of our communities.

Risk Assessment: [start text here and continue without indenting]

Equality Impact Assessment: Engagement activities within the programme will strive to ensure participation is offered to the broadest cross-section of our communities via a variety of methods.

Relationship to Corporate Plan: To ensure that the Council provides access to services for customers in whatever way they choose to transact with us. Ensuring extended access via digital means and improving the way that we hold information and deliver our services to customers, placing them at the centre of what we do

Impact on Climate Change: Review and improvement of our customer service across the council has the potential to increase digital access by understanding and removing barriers. Encourage reduction in paper, travel to Phoenix House and enabling mobility of our officers within our communities decreasing travel.

1.0 Introduction/Background

- 1.1 At the end of 2019 a Scrutiny Working Group looking at the Customer Experience was convened. The Chair was Councillor Chris Daw and also included Cllrs. Chesterton, Hill, Warren and included Cllr Letch as an observer as Chair of Scrutiny.

- 1.2 The working group agreed Terms of Reference focussed primarily on the current ICT system(s), the handling of service requests and complaints and communications between departments.
- 1.3 The working group were finalising their recommendations when the Covid pandemic occurred and there was a subsequent delay in publication. However, the recommendations went to Cabinet in August 2020 and were approved.

2.0 Outcomes and Recommendations

- 2.1 The recommendations of the Scrutiny working group were as follows:
 - That a business case for a new Customer Relationship Management (CRM) system to replace the existing technology is developed and considered by the Cabinet. That any new system be designed with customer need at the centre of the process.
 - 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.
 - 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.
 - 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.
 - That the Planning Department consider re-establishing a dedicated phone answering system, to ensure officers have capacity to focus on applications – this is currently unachievable due to home working during Covid and MDDC technical infrastructure.
 - That the phone waiting times are reduced. A review of why the Service Level Agreement is not being met is carried out.

3.0 Activities to date

- 3.1 During the period from Cabinet to the date of this report the council has had two further Covid lockdowns and been carrying multiple vacancies in Customer Services and ICT. Included in this resource deficit were additional duties and secondment regarding Shielding and the Customer Welfare officer respectively which have impacted on availability of resource to progress some of the recommendations. Vacancies are now being filled so that we hope to see the start of meaningful progress.
- 3.2 CRM – Market Engagement. In the late autumn of 2020 a market engagement exercise for a new CRM or Digital Platform took place. This resulted in a number of suppliers providing demonstrations and overviews of their systems. These were attended by Cllrs Woollatt, Daw and Knowles and

a small number of senior officers in order to understand the possibilities that a new CRM or Digital Platform could provide.

- 3.3 In a subsequent meeting to summarise findings and express opinions about what had been presented to them it became apparent that there are opportunities around additional benefits for members, service communications and mobilisation of officers which broadened the potential benefits that a new CRM could give us.
- 3.4 A customer survey is currently in progress and due to finish at the end of March. Participation has been mainly via telephone (no cold calling), with a small amount of online response. The initial three month exercise was extended due to Covid and to try and increase initial response. Any findings will therefore need to be considered through the lens of our customer/council joint experience over the last 12 months.
- 3.5 Member Workshop – A workshop for members to discuss and explore ideas around quality customer service is planned for late March. This is intended to identify what is important to members because of their engagement with their constituents and identify their expectations. This will be facilitated by the South West Contact Centre Forum, which MDDC is a member of.
- 3.6 Staff Training – Work has commenced with a training supplier to explore future requirements and formats, but this work has had to be postponed due to resources being required for Elections.
- 3.7 In discussion with members around the CRM and more broadly with staff and senior managers, it is the opinion of the author that a comprehensive, consistent and planned approach to improvement of Customer Service in MDDC is required. Therefore, the former Scrutiny recommendations have been re-badged as a programme of work consisting of projects and activities that align with the recommendations and ensure that we consider all aspects of the council/customer relationship. See Appendix 1 for a top level overview of the programme.
- 3.8 The timescales for this programme are considerable, predominantly for any potential CRM replacement and implementation. The resources are to be found within existing staff for the most part, so peaks and troughs of work will impact on ability to deliver progress. This will be reviewed as part of the CRM business case. For example, Elections, Annual Billing and other key projects will utilise the same resource and may by necessity take precedence over this longer term improvement. The purpose of the programme is to define the activities, provide focus of attention and where possible only do necessary work once.
- 3.9 The creation of a Programme of work will allow for better planning across services for scheduling service reviews and the inevitable service impacts. The programme of activities can be more easily communicated, and the relationship between activities understood. There are dependencies within the original recommendations that mean service reviews must be done before or during implementation of a new CRM for specific services in order to maximise benefits and improve service.

- 3.10 Monitoring of progress will be done either by reporting against individual projects, or via agreed reporting of activities against the programme as determined by Cabinet/Scrutiny.
- 3.11 That the Planning Department consider re-establishing a dedicated phone answering system, to ensure officers have capacity to focus on applications – this is currently unachievable due to home working during Covid and MDDC technical infrastructure.

4.0 **Customer Service Improvement Programme**

The programme is expected to consist of the following themes:

- **Technical** - Business case and prospective procurement and implementation of new CRM/Digital Platform system(s) to enable us to scrutinise, modernise and digitise our services more effectively. Review of systems to reduce licensing, technical and integration costs.
- **Business** – Service performance and practice reviews done in conjunction with implementation phases of any new system(s). Service Level Agreement review; consideration and centralisation of revised performance metrics and costs/savings as appropriate.
- **Policy** – Review of our Customer Service and Complaints policies, procedures and metrics. Collaboration with officers and members around core values and a common understanding of good customer service.
- **Engagement** – Campaigns to increase engagement with our customers across our communities as we review and redesign services. Increase profile of digital as and when we can, whilst retaining ease of access for customers with varied needs. Regular surveys and feedback requests from our customers on satisfaction and service changes. Exploration and understanding of digital inclusion/poverty.
- **Culture & Training** – Exploration of attitudes and behaviours around customer service. Staff training in line with revised policies, technology and business process review practices.

5.0 **Continuing Member Involvement**

- 5.1 The Portfolio holder for Working Environment will sit on the project board for the CRM procurement and implementation. Members will also be invited to attend workshops and participate in campaigns and engagement exercises with the public.

Contact for more Information: Lisa Lewis, Corporate Manager for Digital Transformation & Customer Engagement

Circulation of the Report: Cabinet Member

List of Background Papers:

CUSTOMER SERVICE IMPROVEMENT PROGRAMME

<ul style="list-style-type: none"> • Customer Profiles • Service Review schedule • Corporate & Customer service level agreements • Performance metrics • Service Reviews and Benefits Realisation • Internal & External Communication Plans • Improve management information 	<ul style="list-style-type: none"> • Review of Customer Care and Channel Access policies/strategy • Review of Complaints Policy and performance metrics • Core Customer Service Values • Equalities & Accessibility 	<ul style="list-style-type: none"> • Focus groups on current attitudes to customer service • Member Training on service access via self-service and the web • Staff/Member Training on Customer Service • Staff training on business/service process reviews. 	<ul style="list-style-type: none"> • CRM Business Case & Procurement • Implementation Plan & Schedule • Technical infrastructure review • Integration assessments & costs • Data Warehousing, Reporting and Performance metrics • Department Service desks for customer enquiries • Mobilisation of officers 	<ul style="list-style-type: none"> • Identification of targeted customer survey schedule in conjunction with Communications • Exploration and understanding of Digital Inclusion/Digital Poverty issues and opportunities • Explore methods of engagement around service change and redesign