

SCRUTINY
11 OCTOBER 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.

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. There is no additional budget impact identified at this time.

Approved by Finance: [yes/no – include name/post title, eg Group Manager for Financial Services]

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

Approved by Finance: [yes/no – include name/post title, eg Group Manager for Financial Services]

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

Approved by Legal: [yes/no – include name/post title, eg Group Manager for Legal Services]

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

Approved by Performance/Governance: [yes/no – include name/post title, eg Group Manager for Performance, Governance and Data Security]

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.
- 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 finalised report and recommendations below were approved by Cabinet in August 2020.

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
 - 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 on recommendations

- 3.1 CRM - Market Engagement took place in 2020 for information gathering on market options. 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.
- 3.2 ICT resources have been low during the interim period, with recruitment issues focussing us on operational priorities. Additional resource has been found and we are currently recruiting for a Project Manager to move this forward. We hope to have this resource in place during the Autumn at which

point we will commence work on the benchmarking for the business case and preparation for the procurement exercise.

- 3.3 Customer Survey – A survey took place over a period of 12 months with over 3,000 respondents. Predominantly this response was due to the efforts of the Customer Services team. Results of the survey were published to members via the Weekly Information Sheet for w/c 28/08/21. **See Appendix A**
- 3.4 The results of the survey will be further utilised as we look at building the solution of the new CRM/Digital Platform, providing context for the business approach and solution design. As part of the Customer Service Improvement Programme of activities we have engaged with the Portfolio Holders for Working Environment and Continuous Improvement as we develop a set of standards around Customer Service. We are liaising with these members to confirm a short set of questions around satisfaction that we will look to rollout across multiple services in order to obtain continuous and real-time feedback moving forward.
- 3.5 Customer Focussed Culture - A Member Workshop took place in March facilitated by the South West Contact Centre Forum, which MDDC is a member of. In addition to this we are planning to survey members on their training needs around Customer Service to help support and improve how we manage customer communication and interactions at all levels of the organisation.
- 3.6 Staff Training – Planning for staff training is in progress around a set of standards to be determined and agreed via the Customer Service policy review due to Community PDG and Cabinet in November.
- 3.7 Planning Department – From 6th September there will be dedicated telephone resource in the service to manage queries and act as liaison for the wider service and organisation. These lines will be staffed Monday to Friday. Details will be provided to Members.
- 3.8 Call Wait Times - Times continue to be below target. A wider and more comprehensive review within the budget window and as part of project planning for changes to the way we work needs to take place, but the known causes for this are as follows:
 - Increased telephony contacts as opposed to visits
 - Staff turnover
 - Fixed Term/Temporary Contracts adding to retention issues
 - Covid Activities, e.g. increased Grant/Isolation queries
 - Requirements to address more at first point of contact mean calls are longer
 - As an entry level into the wider council Customer Services staff frequently take the opportunity to move on to services as vacancies become available.

It should be noted that the calls answered remain well above target, indicating that we are still connecting with our customers and not experiencing

significant numbers of abandoned calls. Thereby, being within customer tolerances.

4.0 Continuing Member Involvement

- 4.1 The Portfolio holder for Working Environment will sit on the project board for the CRM/Digital Platform procurement and implementation. Members will also be invited to attend workshops and participate in campaigns and engagement exercises with the public.
- 4.2 The Portfolio holders for Working Environment and Continuous Improvement are currently engaged with Customer Services on the Customer Service Improvement Programme as stakeholders and as above are assisting with a review of policies, identifying standards and survey requirements.

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

Circulation of the Report: Cabinet Member

List of Background Papers: