

14 January 2015

Finance & Resources Committee

Customer Services Transformation – Customer Access Strategy

Report of: Steve Summers

Wards Affected: All

This report is: Public

1. Executive Summary

1.1 The Customer Services Transformation Detailed Business Case setting the Council's approach to offer a modern, high quality and effective customer services was approved at the Strategy and Policy Board on the 20 November 2013.

1.2 The Business Case identified that the Council was offering very traditional and outdated methods for customers to access its services. The concept of the Customer Services Transformation was to move away from the traditional reception/telephone service offered by the Council to a new model that offered a wide range of modern and efficient access channels for customers.

1.3 In order to progress to the new model of customer services a Customer Access Strategy is required to set out the Council's approach to how it will deliver services to customers in the future. The key aim of the strategy is to improve customer experience and satisfaction and drive down costs through economies of scale and joined up processes.

1.4 The Customer Access Strategy provides the overarching framework for the channels (or methods) the Council will use to interact with customers to ensure the successful delivery of our services with the resources available. The strategy sets out the following strategic principles that we will focus on as we deliver improvements to our customers services:

- Be open to all
- Provide Choice
- Meet Needs
- Deliver First Time
- Provide Satisfaction

- 1.5 Key to the delivery of the Customer Access Strategy is the High Level Implementation Plan which contains a number of key actions. One of these is the development of a Channel Strategy which will identify the channels the Council will use to deliver services to and interact with its customers. A Channel Strategy will set out how the Council will meet the contact demands of its customers using the resources it has available and bearing in mind the needs of the customer.
- 1.6 In addition, the High Level Implementation Plan has an action to undertake investigations into a suitable Customer Relationship Management system (CRM) to ensure that an appropriate system is selected to meet business needs. Future work will also be required to provide end-to-end transactions that are fully integrated with the Council's back office systems and processes through the use of technology.
- 1.7 The High Level Implementation Plan also includes the development of a Customer Portal which will provide resident's online access to manage their accounts/services with the Council.
- 1.8 Attached as Appendix A is the Draft Customer Access Strategy and High Level Implementation Plan.

2. Recommendation(s)

- 2.1 That Members agree the Customer Access Strategy and High Level Implementation Plan.**

3. Introduction and Background

- 3.1 The Customer Services Transformation Outline and Detailed Business Cases offering modern, high quality and effective customer services was approved at the Strategy and Policy Boards on the 26 June and 20 November 2013 respectively.
- 3.2 The Detailed Business Case identified that the Council was offering very traditional and outdated methods for customers to access its services, which included a number of separate reception areas; a mix of direct line and switchboard facilities for telephone enquiries and limited access for our customers to transact with the Council through web based facilities.

3.3 A key element of the Customer Transformation was the concept of a Customer Contact Centre to move away from the traditional reception/telephone service offered by the Council to a new model that offered a wide range of modern and efficient access channels for customers.

3.4 The service would consist of three main strands;

- A modern, and customer friendly website with increasing options to transact on-line with the Council;
- An effective and efficient telephone service with direct access to trained advisors able to resolve most queries without the need to refer the customer on.
- Handling other contact channels such as post, emails, text messaging and social media.

3.5 In addition to the customer benefits identified above the Business Case proposed that savings of £250k were to be achieved through a number of methods as set out below;

- Lower transaction costs by encouraging customers to shift to less costly contact channels. E.g. Self-Service
- Increased economies of scale through generic front of house and telephony services, achieved by migrating enquiry handling and related staff roles into the Customer Service, and reducing overall staff numbers required.
- Streamlined processes for more efficient enquiry handling.

4. Issue, Options and Analysis of Options

4.1 The original Business Case identified a number of financial and non-financial benefits from developing a Customer Services Transformation programme and Customer Contact Centre.

4.2 At the Audit & Scrutiny Committee, 30 September, Members received a report on progress to date against the Internal Audit Plan. The report provided information on the review of Customer Services which had been completed in quarter 1 of 2014/15 and had given a 'moderate' assurance which reflected the Council had made some progress but was still in the early stages of development of the Customer Services Transformation and the Contact Centre. An action plan had been agreed to address the audit recommendations.

- 4.3 Following a review of the Detailed Business Case by Officers it has been established that the proposed savings in 2014/15 would not be achieved. This is due largely to the amount of training and reorganisation required to make the Contact Centre effective and the lack of a Customer Access Strategy and detailed action plan to identify how and when financial benefits would be realised. Going forward projects will include detailed planning of savings to identify how and when financial benefits will be realised to ensure there is not over estimation of any savings in Year 1.
- 4.4 Therefore one of the key actions set out in the audit plan was the development of a Customer Services Access Strategy to ensure that benefits are realised. In addition the Strategy will also ensure that any further process redesign or investment in technology will tie into the Council's savings targets, which are based on increasing demand for online customer access and reducing the demand for expensive face to face and phone access.
- 4.5 As advised elsewhere in this report the Customer Access Strategy will provide the framework for future priority areas for channel shift to enable further customer self service through the Council's website providing future benefits.
- 4.6 At the Audit and Scrutiny Committee, 26th November 2014, it was agreed that the Finance & Resources Committee be advised that the Strategy and Implementation Plan includes analysis of different customer access channels, the demographics of the Borough, and customer feedback. Actions within the High Level Implementation Plan will cover this.
- 4.7 Once the strategy has been approved investigations into a suitable Customer Relationship Management system (CRM) will take place to ensure that an appropriate system is selected to meet business needs. Future work will also be required to provide end-to-end transactions that are fully integrated with the Council's back office systems and processes through the use of technology.

5. Reasons for Recommendation

- 5.1 To enable the Council to deliver effective and efficient customer services for the benefit of the Council and its customers

6. Consultation

- 6.1 No consultation required.

7. References to Corporate Plan

- 7.1 Delivering an effective and efficient customer services will help meet the Modern Council key priority.

8. Implications

Financial Implications

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- 8.1 There are no direct implications arising from the report. Any costs and resource requirements relating to the delivery of the Customer Access Strategy will be contained within the current Customer Service budget and ICT Capital Programme.

- 8.2 The current anticipated savings from the Customer Transformation Programme are:

2015/16 £100,000

2016/17 £150,000

2017/18 £200,000

These savings will be further quantified and developed as the service planning work is completed. The anticipated savings listed above will be incorporated within the MTFP.

Legal Implications

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- 8.3 None.

Other Implications

- 8.4 None

9. Background Papers

- 9.1 28 June 2013 Strategy and Policy Board – Customer Services Transformation (Outline Business Case)

- 9.2 20 November 2013 Strategy and Policy Board – Customer Services Transformation (Detailed Business Case)
- 9.3 30 September 2014 Audit and Scrutiny Committee – Internal Audit Progress Report
- 9.4 29 October 2014 Finance and Resources Committee - (Half Year Budget Review 2014/15)
- 9.5 26 November 2014 Audit and Scrutiny Committee – Customer Services Transformation – Customer Contact Centre

10. Appendices to this report

- Appendix A - Draft Customer Access Strategy and High Level Implementation Plan

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