

To: City Executive Board

Date: 18 February 2009

Item No

Report of: Head of Customer Services

Title of Report: Customer Contact Strategy

Summary and Recommendations

Purpose of report: To agree the content and high level plan for the Council's Customer Contact Strategy

Key decision? No

Executive lead member: Oscar Van Nooijen

Report Approved by:

Finance: Lindsay Cane

Legal: Sarah Fogden

Policy Framework:

Recommendation(s):

1. The City Executive Board is asked to endorse the Customer Contact Strategy as an interim strategy and note that the new Head of Customer Services will be reviewing this as part of the Customers First programme.
2. Request the Value and Performance Scrutiny Committee to programme and undertake a focussed review of the Council's Customer Contact Strategy and the implementation of the Customer Relationship Management system at an appropriate point later in 2009.

Introduction

1. The Council's Transformation Strategy addresses the objectives of the corporate plan through six broad areas, of which putting 'Customers First' by providing modern customer services is one. The Customer Contact Strategy sets out where we are now, where we want to be in 2012, and how we will measure our progress.

The Strategy

2. The key aims of the strategy are:

- Increasing access over the web: **CLICK**
- Reducing waiting times for our phone services: **CALL**
- Improving the ways we manage our face to face interactions with customers : **COME IN**
- Listening and responding to customer feedback.
- Dealing with the customer queries at the first point of contact, measured through NI14
-

Key medium term targets

3. It is intended that as a result of the implementation of this strategy the Council will

- Have no more than two telephone call centres, with an abandonment rate below 5% and 80% of calls answered within 20 seconds;
- Have a single record for all customers through the operation of the Customer Relationship Management (CRM) system to be implemented in 2009/10;
- Have a website with increased transactional links to drive increased use;
- Have one centrally-located one stop shop for Council services and at least one satellite shop;
- Have an agreed set of targets for Customer Service standards including response times and the percentage of queries dealt with 'first time';
- Have trained all relevant staff in customer service skills.

Budget implications

4. The cost of the CRM systems and web changes etc. are being funded by the Business Transformation budget.

It is possible that the costs of customer contact will rise in the short term before re-organisation of face-to-face points and call centres. Changed methods of contact will result in savings. However; each of the projects carried out under the strategy will be the subject of a Business Case outlining the costs and expected efficiencies. These will be considered and monitored by the Transformation Board, and brought to the City Executive Board where necessary.

Deleted: .

Risks

The Business Case for this strategy, considered by the Transformation Board, for this strategy identified the following risks.

Risk & Description	Likelihood	Impact (High/Medium/Low)	Counter Measures
Key Staff Leave	M	H/M	Clear objectives and roles
Lack of commitment and understanding from other units	M	H	Information to be provided on a regular basis, improved communication on progress

Recommendation

The City Executive Board is recommended to

1. Endorse the Customer Contact Strategy as an interim strategy and note that the new Head of Customer services will be reviewing this as part of the Customer first programme.
2. Request the Value and Performance Scrutiny Committee to programme and undertake a focussed review of the Council's Customer Contact Strategy and the implementation of the Customer Relationship Management system at an appropriate point later in 2009

Name and contact details of author:

Paul Warters, Head of Customer services.
pwarters@oxford.gov.uk
tel.01865 252233.

Background papers: none

Version number: 4

Customer Contact Strategy

The Council's Transformation Strategy addresses the objectives of the corporate plan through six broad areas, of which putting 'Customers First' by providing modern customer services is one. 'Customers First' is the Council's programme to, put customers needs at the forefront of its work, improve customer service and join up its work across all service areas. The Customer Contact Strategy sets out where we are now, where we want to be in 2012, and how we will measure our progress.

1 The strategy

The key aims of the strategy are:

- Increasing access over the web: **CLICK**
- Reducing waiting times for our phone services: **CALL**
- Improving the ways we manage our face to face interactions with customers : **COME IN**
- Listening and responding to customer feedback.
- Dealing with the customer queries at the first point of contact, measured through NI14

The strategy works according to three key principles:

- Customer-focussed services
- Quick and easy to access services
- Cost effective services

The modernisation of Customer Services is a corporate aim which will set corporate standards and objectives to be recognised and achieved at all customer contact points, wherever they sit within the Council's structures. The programme will therefore encompass all services and access channels to ensure that the three key principles are adhered to and, where appropriate and feasible, multiple requests for services are dealt with at one point of contact. Rather than focusing on our needs as a supplier of public services, the Council will focus its provision on what the customer needs and expects, by joining up our operations across service areas.

This will enable the Council to provide the service people want, when they want it, in a way they wish to use it. These services must also be efficient and cost-effective.

This strategy identifies where we are now with reference to our current performance, sets targets for future performance, gives details of actions required to improve performance and puts in place measures to monitor that improvement.

2 Key targets

- Improve first contact resolution ('do it first time') performance to over 50% of contacts;

- Improve our website to make it more ‘transactional’ and increase the amount of contacts through that route;
- Telephone abandonment rates below 5% and 80% of telephone contact with the Council answered in 20 seconds;
- Review the need for extended opening hours;
- Improve processes to support first contact resolution;
- Review the location and distribution of customer services functions in face to face centres so that every centre can deal with as many areas of the Council’s services as possible

2.1 NI14

National Indicator 14 (NI 14) ‘Reducing avoidable contact: Minimising the proportion of customer contact that is of low or no value to the customer’.

To monitor progress in respect of this indicator, the Council will sample interactions with the public and ascertain which of these interactions are ‘avoidable contact’. A ‘Customer Contact Champion’ will be identified within each service area to take responsibility for the collection of this data and improve our systems and processes to reduce avoidable contact.

Councils are already required to record the proportion of avoidable contacts in respect of selected key service areas covering high volume citizen and business transactions across a number of typical council departments. For district-level authorities the IDEA has identified the following key areas:

- Planning services (local planning issues)
- Building control
- General council tax enquiries, billing and recovery process for payment of council tax and national non-domestic rates
- Environmental Health services (licensing, food safety, pollution and pest control)
- Street scene – waste collection and street cleaning, including recycling, street furniture and fly-tipping
- Housing (benefit claims, council tax benefit, repairs, allocations and lettings process for social housing)
- Electoral register (including registration and enquiries on electoral services)
- Parking permits and Parking Control Notices.

In the first year (2009) the Council will take a sample of just over 1000 interactions and the CRM system proposed as part of this strategy will enable larger sampling to take place.

3 Where are we now?

At present, customer contact functions across the Council are delivered in different ways and across a wide variety of access channels, with no standardised measures of the quality of the contact and not enough consistent assessment of how we meet our customers’ needs. This situation has occurred organically, because each service has

traditionally considered front office functions as an 'add-on' to back office processes, without necessarily fully integrating them into those processes.

Much more sophisticated insight into our customers' needs will be developed as this Strategy is implemented, which will in turn inform our corporate planning and development of service processes. As a first step, the talkback panel will consider Customer Services issues (in early 2009).

3.1 What our customers contact us for

Our customers contact us for a variety of reasons. The most important types of contact are:

- Asking for information
- Asking for advice
- Making a payment
- Requesting a Council service
- Using facilities e.g. sports and leisure centres
- Reporting a service issue
- Making a complaint
- Responding to community engagement exercises

3.2 Council Contact with our Customers

In addition to the things the public contact the Council about, there are times when we need to make direct contact with our customers.

Examples include consultation and Council Tax billing. The majority of these contacts will be by mail or personal visit.

3.3 How our customers contact us

3.3.1 Telephone Contact

We currently have four main telephone contact centres, which separately provide services for

Service	Calls per annum
• Customer Services	100,000
• Oxford City Homes,	77,500
• City Works	104,055
• Elderly Services(alarm calls)	145,718

Telephone access to all other services is either via a main switchboard number or via direct dial numbers notified on individual correspondence with customers. Such an approach relies on staff being available to answer their telephone, and at present this

does not provide management information on contact with customers and risks not giving a consistently reliable service.

An out-of-hours telephone service is currently provided by the alarm control centre in Elderly Services due to the needs of their service needs for 24 hour access. They refer emergency calls to the relevant out-of-hours duty officers or advise non-urgent callers of the contact details and available times of services.

Trials in Oxford City Homes and in Customer Services showed there was very little demand for telephone contact after 6 p.m. This also proved to be the case with demand for Customer Services on Saturday mornings.

3.3.2 Face to face contact

We have numerous advice / reception points across the council:

Service	Visits per annum
St. Aldates Chambers	35,000
Ramsey House	21,400
Blue Boar offices	figures not recorded
Town Hall reception	figures not recorded
Templars Square	14,200
Oxford City Homes	5,500

This situation is confusing for the customer. Often the customer will visit the most visible/accessible office only to find that they need to go elsewhere, because the service they happen to need is not available at all offices.

3.3.3 Online contact

In the financial year 2007/08 there was an average of 95,706 website sessions per month.

The most popular sites and usage for 2007/08 were:

FAQs	189,236
AtoZ	159,997
Pay	151,757
News	133,594
Council Meetings	109,480
Councilors	88,298
Park and Ride	66,492
Ferry Sports Centre	63,008
Oxford Ice Rink	62,586
Planning Applications Search	62,119
Jobs	37,820

The detail of the usage patterns of our website is part of a project already under way underpinning this strategy to ascertain which information is most frequently used, and

this will be developed further to improve the transactional capacity of the Council's online presence.

3.3.4 Contact by email

Currently we have a general email address for any type of enquiry which is dealt with by customer services staff. They will respond if they have service area knowledge or forward to relevant service for action if not.

Most services also have service specific email addresses, which are processed within teams. Individual email addresses are also used but this can lead to inefficient service when that individual is not available. There are no standard performance targets across the Council for dealing with email enquiries and these will be agreed as part of a project forming part of this strategy, to include consideration of the benefits of providing only a limited number of externally-facing email addresses for the Council.

3.3.5 Correspondence by post

All service areas receive written correspondence and have their own administrative procedures for dealing with this. There are no standard performance targets across the Council for dealing with written correspondence.

3.4 Current projects

3.4.1 We have completed the purchase of Customer Relationship Management software to enable us to increase our knowledge of individual customers, increase productivity of processes associated with customer contact and simultaneously improve service levels and consequently customer satisfaction. The new systems are currently being implemented in Oxford City Homes, with a planned expansion to City Works and Customer Services in 2009. As Customer Services already provides the 'front end' service for Revenues and Benefits, the CRM system will be applied to these services first. It will then be used as a basis for work with other services that can be provided through a general contact centre both by phone and face-to-face.

3.4.2 We have recently opened a new service centre in Cowley Centre, which makes the service more accessible to residents over a wide geographic area as it is well served by bus routes and is somewhere that they go any way. This fits with a key target of rationalising services.

The Customer Services department has been tasked with finding partners to work in one-stop shops. Whilst discussions have commenced this project is unlikely to proceed until the future location of a city centre shop is known. Other alternatives, such as the Council providing information points in commercial buildings (e.g. supermarkets), will also be explored.

3.4.3 An accommodation review is currently underway which has clearly defined an objective that there should be **one** major one-stop shop within the City Centre that provides access to all services.

3.4.4 Several projects are underway to examine ways of providing more services electronically, e.g. online application forms, direct access to personal account data and better payment systems.

3.4.5 Customer Services incorporates the Revenues and Benefits service which has enabled improved processes and first contact resolution for those services. The experience gained from this model will be taken forward to other services as the strategy is implemented and developed.

4 Where do we want to be in 2012?

Applying the principle of 'customer first' across the Council, we will focus on the customer – not the supplier of public services.

We will have rationalised and improved our approach to customers to improve service, reduce duplication and enable personalisation.

We will have improved telephone (call) and internet (click) options to encourage their use wherever possible, while also providing one-stop shops (come in).

We will continue to provide at least two one-stop shops with the largest in the city centre. In two services (OCH and City Works) there will probably continue to be some customer contact at Council depots

This improvement will allow better access to the Council's services using the right channels for all customers, including enhanced citizen and business transactions via the internet, one stop shops and by post, underpinned by clear service standards and a focus on equalities.

In summary, by 2012 the Council will provide:

- a consistent, reliable, high quality level of customer service, every time
- easy access to services at a convenient time, using the method customers prefer including the web, calling the council, or coming into council outlets
- a service which can solve most customers' problems there and then, at the first point of contact, and which can track enquiries through to completion
- all services available via customer advisers, enabled by customer relationship management (CRM) processes and technology. This will enable us deal with customers more efficiently because they will have a single customer record, no matter how many services they have used.
- Effective and efficient customer services
- A modern, flexible structure with better skilled staff. Staff will be trained and have the systems, processes and equipment available to enable their work to provide better value, and in so doing the Council will have achieved Investors in People accreditation.

5 How do we get there?

The Business Transformation programme has been set up to make fundamental improvements in the way we do business, deliver services to customers and provide value for money.

The delivery of better customer services will involve the alignment of the Council's staff, processes and technology with our customer contact principles and objectives to support and help develop new ways of working, provide improved levels of customer service and increase value for money. We will deliver this by implementing a new operational model for customer services across the council.

This will include new management practices, processes, new technology, creating an improved customer contact culture, providing staff training, and revising some structures where appropriate. All customer contact will be designed and carried out using the concept of end-to-end processes across and within services using Business Process Improvement (BPI) techniques.

As mentioned under 2.1, each service area will have a 'Customer Contact Champion' They will be responsible for ensuring that business improvements across their service align with the Customer Contact Strategy

5.1 Timetable

During the first year, the CRM system will be implemented in OCH, City Works and Customer services.

Early in 2009 the Talkback panel will consider the needs of our customers and enable us to draw conclusions to inform the implementation of this strategy.

Customer Services will be working with an external partner to carry out extensive Business Process Improvement initiatives to better utilise the CRM system.

A training session on Customer Contact will be run for all staff, the payments systems will be improved, self service elements of the Academy Housing Benefit and Council Tax system will be implemented and mechanisms put in place to deliver further improvements in performance of the Customer Services call centre.

In Year 2 the Customer Services team will work to develop 'front end' services for other services. This is likely to involve the some internal reorganisation of staff and functions between services.

In Year 3 initial implementation within all services will be complete and the focus will then be on making further improvements in customer contact standards and continually developing the use of the internet for interactions with the Council.

Each of these elements will be the subject of a detailed action plan and Business Case, agreed and monitored by the Business Transformation Board and Council via the City Executive Board where necessary.

5.2 Customer focussed services

At present, some staff whose duties require them to deliver 'customer services' to the public have not been formally trained in dealing with customers, and the service structure of the Council is not necessarily easily understood by our customers. We will gather and analyse information about complaints to identify areas where we can improve services. This strategy means the Council will increase customer confidence in our services by being able to

- Understand our customers through data, research and consultation;
- Develop a customer-focussed culture;
- Design our services to meet the needs of all our customers;
- Train all our staff in customer care;
- Ask our customers if they are satisfied;
- Protect our customers' personal data;
- Undertake a programme of Business Process Improvement (BPI).

5.3 Quick and easy access to services

There are a large number of potential face-to-face contact points and communication methods across the Council, which can lead to confusion for customers. Currently, most contact points deal only with specific work areas, often requiring the customer to use another number, email address or postal address to provide similar information more than once.

The Council intends to make access quicker and easier by:

- Rationalising and improving customer one stop shops and call centres
- Promoting awareness of access methods and services;
- Improving customer contact response times;
- Reducing barriers to access and encouraging participation;
- Continuing to provide access to interpreting and translating services;
- Reviewing the need for extended opening hours;
- Delivering services at locations that suit customers;
- Working with our partners;
- Meeting customer needs at first point of contact.

5.4 Cost-effective services

We have some information on the costing of our services. The drive corporately is to provide value for money services. The corporate plan identifies the need to provide better value for money, by implementing cost and efficiency savings. This strategy

contributes to this goal in the following ways:

- Lowering transaction costs by making it easy for customers to contact us by telephone and email rather than making face to face visits;
- Identifying service efficiencies by cutting out duplication and improving first contact resolution performance;
- Undertaking a programme of Business Process Improvement (BPI);
- Following Council procurement policies;
- Improving payment methods by ensuring we have robust technology to allow us to accept electronic payments;
- Managing resources effectively;
- Re-organising enquiry points in the city centre into a principal one-stop shop to reduce accommodation costs.

6 Future model of Customer Contact

The model is shown in diagrammatic form in appendix 1

Our customer contact model involves centralising our customer services functions into all-purpose one stop shops and call centres.

- We will provide a principal one-stop shop within the City Centre and at least one outside the City Centre, and work with partners to provide access to services at a more local level;
- We will reduce our telephone contact centres to one or two, providing a full range of services in each;
- The one-stop shops and other Council buildings will also provide public access telephones and PCs to enable people to telephone the contact centre(s) free of charge and access our online services;
- The Customer Relationship Management (CRM) process and system to be introduced in some services during 2009 and developed more widely in 2010-11 will streamline our administrative procedures and ensure that all customers receive a seamless service from appropriately-trained staff;
- The CRM process and system allows for the creation of a 'single customer record' from which we can provide cross-council services and derive useful information about the services used;
- Appropriately-trained staff will deal with a range of requests for service or information and direct in-depth or complex enquiries to the correct service area.

There will continue to be limited customer contact at Cowley Marsh and Horspath

for issues such as taxi maintenance and the services currently run through the Tenants' Resource Centre

In addition, customers will access a wide range of Council services and facilities within their local neighbourhoods. These services and facilities include parks and gardens, leisure centres, car parks and street wardens. These services are designed around the needs of customers and are strategically located in neighbourhoods to maximise access, inclusiveness and use. We will provide customer contact training for our people working in these areas

Data on customer contacts will be collected from all areas and analysed centrally to provide a full view of customer contact to help us plan and integrate Council services.

6.1 Personal (face-to-face) Contact

Some of our customers will continue to prefer face-to-face contact with the Council, and there are areas in which face to face contact is the most efficient way of delivering services. We will continue to provide this service in addition to contact with the Council by telephone, post, or email.

We will periodically review the need for extended opening hours including late-night and Saturday opening of one-stop shops.

6.2 Telephone Contact

Our contact centres deal with approx 300,000 telephone calls from the public and we aim to deal with these calls as quickly and efficiently as possible.

We will set targets for abandonment rates below 5%, with 80% of calls answered within 20 seconds. This will be achieved through Business Process Improvements during 2009. We will analyse the costs and benefits of the use of freephone numbers.

Experience in other organisations suggests that the usage of the call centre will increase as the service improves.

6.3 Postal Contact

Some people will prefer or need to contact the Council by post. We will develop our processes to make this method of contact more effective.

We will use modern technology wherever possible to make this more efficient and cost effective. For example, correspondence relating to Housing Benefit and Council Tax is currently reproduced and stored electronically. Where appropriate, such procedures will be extended across more service areas to improve the efficiency of the service.

We will introduce one central address for all correspondence.

6.4 Online and email Contact

As much information about services should be accessible online to all customers. The Council website is currently being developed to make it more 'transactional', and this is the subject of a dedicated project plan. This means that customers will be able to contact the Council and request more information or services. Council Tax payments can now be made through the website and it is also possible to look at local planning applications on-line. We are aware that not everyone has internet access and will provide self service internet terminals at Customer Contact shops and other Council properties (e.g. leisure centres) where appropriate

We have designed our website to include a number of accessibility features. We hope these features will allow users with disabilities, including those who are blind or partially sighted, to access the information and services they want

6.5 Customer Service Standards

For each way that customers use to contact the Council, we will set standards and guidelines for the level of customer care they will receive.

For example, if contact is made by telephone, then we will set a standard regarding how quickly the call should be answered. If contact is made in writing (either by post or electronically) then we will reply to the query, clearly and concisely, in language free from jargon, within a set number of days.

If contact is via a visit to a Customer Contact shop, we will where possible deal with the enquiry fully at that visit. If a customer attends a pre-arranged meeting we will ensure that we meet them promptly and that they wait for no longer than ten minutes.

These service standards form part of our commitment to our customers and will be reported by all services and monitored corporately to ensure that they are met. They will form the basis of staff training. A full 'Excellent Standards for Customer Care' policy, which will state the minimum standards to be achieved, will be publicised on our website when systems are in place and will be subject to review.

6.6 Listening to our Customers

If we are to improve customer satisfaction, it is important that we provide services that our customers want delivered in a way that they are able to use. This will involve a rolling programme of review across all our services and changing aspects of our services to reflect changing customer demands.

If we are to make the right changes, we need to have effective ways of listening to our customers and understanding their needs.

To enable services to reflect customers' needs, we will encourage their involvement in designing our working practices

To help us provide a good quality service we will ask customers regularly about the service they have received, through Customer Contact Surveys. This information will be used to make sure that we continue to provide a consistently excellent level of service and to help us to look for new ways to improve our service delivery.

We will actively encourage feedback on all of our services by making it easy for the customer to let us know how they felt about the service provided.

We will provide easy feedback channels on our website, by correspondence and call-backs.

Feedback, including complaints, will be monitored and responded to corporately. Service reviews and changes will be undertaken in response to feedback

6.7 Staff Development and Training

We will put in place a customer care training programme to ensure staff across the Council are trained to deal with a range of customer demands and demonstrate our commitment to customer care with by providing courteous and efficient service. We aim to give our staff the opportunity to develop their customer service skills, and to be involved in the development of customer contact services

7. Data Protection

Under the Data Protection Act 1998, we must ensure that our customers' personal information is processed fairly and that it is only used for the purpose for which it was provided. This information may simply include names and addresses but depending on the nature of the service being used, might also include other information of a personal nature. We will keep customer information private and will not process or publish it in any way incompatible with the Act. We will not share it with other bodies unless required to by law, or with our customers' express consent.

8. Equality, Diversity and Accessibility

The Council is committed to promoting equality for its employees and the wider community, irrespective of race, colour, religion or belief, ethnicity, gender, family status, sexuality, disability or age. It is committed to avoiding all forms of discrimination, whether direct, indirect, individual or institutional.

Managing diversity in service delivery is about providing appropriate services, according to need, for all our customers. We aim to offer high quality services by recognising the diversity of our customers and acting to ensure that they are fully accessible to people with disabilities, customers who use languages other than English and those who might otherwise find it difficult to access services.

We will ensure that we listen to the needs of all our customers by actively seeking representation of the whole community.

We have access to detailed data regarding the population of Oxford and this will be used when making decisions about access channels

We will ensure that rigorous impact assessments are carried out at each stage of the process and for every project within the implementation of this strategy.

9. Tackling climate change

The Council is committed to playing a leading role in climate change. This strategy supports that by aiming to provide services of a high quality that are easily accessible through our website and the telephone. We also aim to improve the number of enquiries which will be dealt with at first contact. These actions will reduce the need for travel.