

## **WAVERLEY BOROUGH COUNCIL**

**EXECUTIVE - 28 NOVEMBER 2017**

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**Title:**

### **CUSTOMER SERVICES REVIEW**

**[Portfolio Holder: Cllr Tom Martin]**

**[Wards Affected: All]**

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**Summary and purpose:**

The purpose of this report is to provide feedback to the Executive from the Value for Money and Customer Services Overview and Scrutiny Committee held on 30 October on the Customer Services Review, and to agree the schedule of activity programmed until March 2019.

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**How this report relates to the Council's Corporate Priorities:**

Customer Services is a Corporate Priority.

**Financial Implications:**

There are no specific financial implications to report at this time. Ultimately the recommendations made are expected to deliver cashable savings once fully implemented.

**Legal Implications:**

There are no immediate legal implications.

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**Background**

1. A presentation was previously made to the Corporate Overview and Scrutiny Committee on 22 November 2016 and members were supportive of the overall direction of travel and of the themes being explored as part of the Customer Services Review.
2. A series of interim recommendations were put before the Executive at their meeting of 10 January, 2017 including;
  - Revise the performance management system to ensure decision makers have a holistic, evidenced diagnosis of how a service is performing
  - Channel shift
  - Assess options re customer point of contact
  - Assess options re dedicated customer services staff
  - Assess options re the Council's local presence in the community
  - Assess options re customer contact management systems
  - Review strategies, policies and service standards
  - Identify and review operational processes which will drive service improvement

- Assess options to facilitate a drive of cultural change (including a commensurate training programme)
  - Design a communication plan to support, facilitate and launch the approach to Customer Services
3. At the meeting, the Executive agreed to request the Head of Customer and Corporate Services and the Officer Foresight Group to continue the review of customer services. The Foresight Group have developed their recommendations which were reviewed at the Value for Money and Customer Services Overview and Scrutiny Committee met on 30 October. The minutes record:

*“At its meeting on 30 October 2017, the Value for Money and Customer Service Overview and Scrutiny Committee received an update on the progress that had been made with the customer services review. This included the channel shift programme, the aim of which was to move transactional functions to more automated services.*

*The Committee was generally pleased with the progress of the review, and the potential for savings of £75,000 - £125,000pa to be generated. However members also emphasised the importance of taking into account the demographics of Waverley, and ensuring that less IT literate residents still had access to key services”.*

### **Proposals/Schedule of Action**

4. The proposals, as described to the Overview and Scrutiny Committee are set out in the table below. Activity will be delivered and monitored through a series of officer working groups with the involvement of the Portfolio Holder and Overview and Scrutiny Committee when appropriate.
5. It is important that the service planning exercise currently underway recognise this programme of activity given the potential implications for adjusted service delivery mechanisms in the future.

<b>Workstream</b>	<b>Timescale/Lead Officer</b>	<b>Progress/Methodology</b>
Review/refresh the: <ul style="list-style-type: none"> <li>• Performance Management Framework</li> <li>• Customer Services Strategy</li> <li>• Policy/Procedures</li> <li>• Service Standards</li> <li>• Operational Processes</li> </ul>	June 2018  Lead Officers - David Allum/Robin Taylor	First stage is the review of Service Standards with drafts currently under discussion
<b>Channel Shift</b> - implementation is underway.	March 2019  Lead Officers - David Allum/Linda Frame/Heads of	The purpose of the Channel Shift project is to automate transactions as far as is possible so those residents who wish to access services and conduct business via

	Service	<p>a web portal are able to do so.</p> <p>The project will roll out gradually across the organisation as each department will be different in terms of the services that will benefit from this approach.</p> <p>It is also proposed to replace the 130 plus generic e-mail addresses with web forms.</p> <p>The business case is predicated on reduced telephone and personal contact from those customers who have chosen to interact on-line. This will translate to a reduced staff complement required to deal with such enquiries.</p> <p>Channel Shift will be rolled out first in the Housing Department and the project is currently being scoped out in that area. Options are now being considered for the next service area to be scoped out e.g. Revenues. A contractor is being appointed to deliver the software to facilitate requirements.</p> <p>A capital requirement of £40-50k in anticipated (for which we have in year budget), with ongoing revenue costs of £15-20k and a minimum project duration of 18 months.</p>
<p><b>Customer Services Technology</b> - Whilst in time we expect the numbers of calls made to the Council to diminish (as has been the trend for some time with the increasing use of e-mail), at present 50% of all customer contact is made by 'phone and so traffic is still significant.</p> <p>appropriate software and technology is being procured</p>	<p>March 2019.</p> <p>Procurement of the technology is dependent on decisions made on the Channel Shift work-stream, in particular which customer management system is acquired.</p>	<p>Market options are being explored which will inform the business case in due course.</p> <p>Part of this solution may include a voice recognition facility to help direct the customer to the correct service area..</p>

<p>to enable customer call groups to be more effectively managed. This includes the display of real time data in terms of caller numbers, waiting times etc as well as offering the ability for supervisory staff to connect to live calls.</p>	<p>Lead Officers - David Allum/Martin Wilson</p>	
<p><b>Establish metrics to inform future delivery model decisions</b></p> <p>To test out the hypotheses put forward, metrics will be gathered as part of the channel shift work.</p>	<p>Timescale - The collection of metrics will run alongside the Channel Shift work.</p> <p>Lead Officer - David Allum</p>	<p>A key element of the hypotheses is that as call numbers reduce some existing call groups will lose critical mass and may need to coalesce. This applies both to call answering and associated administration.</p>

### **Recommendation**

The Executive is recommended to approve the delivery and implementation of the workstreams set out in the report as the next stage of the Customer Services Review.

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### **Background Papers**

There are no background papers (as defined by Section 100D(5) of the Local Government Act 1972) relating to this report.

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