

# WAVERLEY BOROUGH COUNCIL

## VFM & CUSTOMER SERVICE OVERVIEW & SCRUTINY COMMITTEE

16 SEPTEMBER 2019

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**Title:**

**CUSTOMER SERVICES PROJECT UPDATE**

**[Portfolio Holder: Cllr John Neale]**

**[Wards Affected: All]**

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**Summary and purpose:**

This report gives the Committee an update on the Customer Services Project and includes the results of the Customer Demand survey carried out earlier in the year and referred to in the Corporate Performance Report elsewhere on this agenda.

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

This report relates directly to the Council's priority to improve customer experience ensuring our services can be accessed more conveniently.

**Equality and Diversity Implications:**

Whilst there are no direct equality and diversity implications in this report, there will be important equality and diversity considerations to be taken into account as the Customer Services Project progresses. An Equality Impact Assessment will be carried out at the appropriate time to ensure the needs of our residents and customers are met as well as meeting the requirements of the Public Sector Equality Duty under the Equality Act 2010.

**Financial Implications:**

There are no direct financial implications contained in this report.

**Legal Implications:**

There are no legal implications contained in this report.

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**1. Background**

The Customer Services Project aims to deliver cashable savings in response to the Medium Term Financial Plan and at the same time improve the customer experience.

Set out below is a report that was recently submitted to the Customer Services Project Board and serves as a sound introduction to the work of the review team.

**2. Report on Customer Services Project**

**Background and Context**

Following the budget settlement for 2019/20, the Medium Term Financial Plan identified the need to achieve savings of £3.86m in the following three years. Included in this saving

is a sum of £1.7m to be achieved by means of business transformation, commercial services income and efficiency savings.

In September 2018 a Customer Services Project Team was set up to determine the most cost effective way of delivering customer services at the Council. The aim of the project is to identify how savings can be achieved through both a reduction in customer demand and eliminating waste by increased efficiency. The reduction in customer demand will be achieved by improving on-line accessibility to services and thus increasing the ability of our residents to self serve whilst ensuring that those who are unable to access services on-line are still supported.

The Customer Services Programme Board have agreed the following principles for the project:

- Reduce costs through self service and efficiency.
- Maximise ability for customers to self serve on-line and remotely
- Maximise resolution of query at first point of contact
- Maximise the transactional functionality of the website with integration to back-office systems avoiding duplication of effort.
- Ownership of enquiry is established at first point of contact.
- Customer expectations are defined and managed.
- Establish a customer service culture with clear accountability, defined roles and professional development.
- Customer insight is developed to further understand the needs of our residents and businesses.
- Business processes are mapped and workflow used to secure maximum efficiency.
- Ensure methods are future proofed

### **Existing Customer Service Teams**

Whilst Waverley has a distributed model of handling customer inquiries through the different service areas there are two service areas which have set up teams to deal with the bulk of in-coming calls. These are situated in Housing and Environmental Services. There is also the team covering calls to the main switchboard and visitors to the building through main reception.

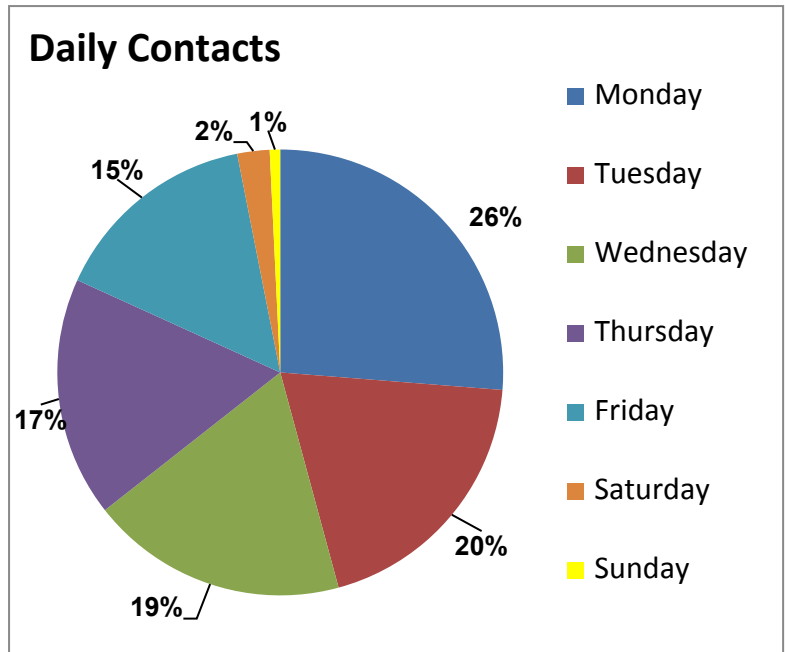
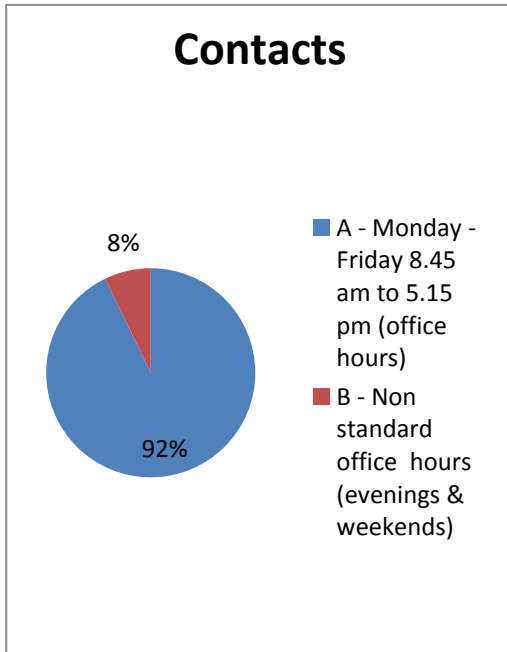
### **Customer Demand Data Survey**

In February this year a survey was carried out by all staff to ascertain the level and nature of customer demand coming into the Council.

The survey was designed to collect information on:-

1. The number of contacts received
2. When contacts were received (time and day)
3. The type of contact each member of staff received – email, telephone call etc
4. The type of customers – resident, business, partner organisations
5. The nature of the contact i.e. what was the query
6. Whether the query was resolved

Week	Number of Contacts	% in each week
1	8540	46.3%
2	5607	30.4%
3	4315	23.4%
<b>Total</b>	<b>18462</b>	

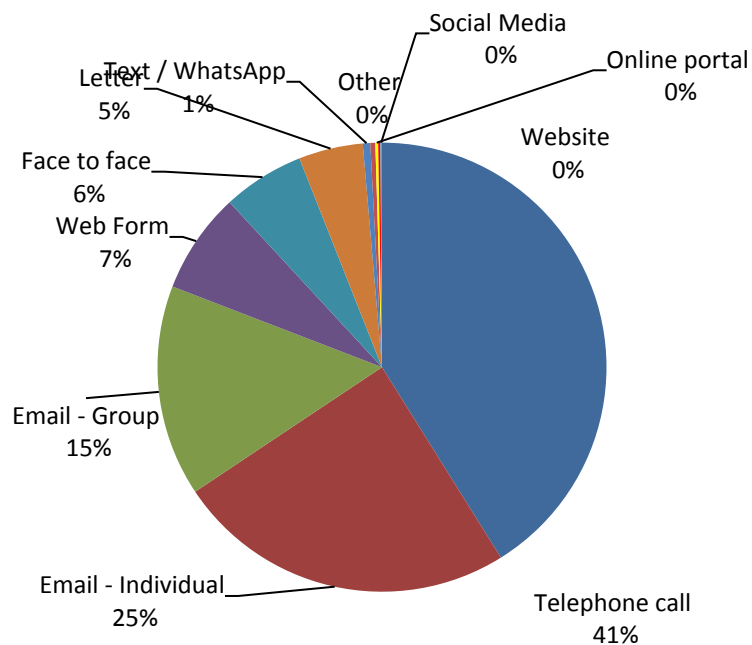


The time when customers contact us is overwhelmingly during office hours. However, given the following information about channel types it may be surprising that so many emails come in during office hours.

### Contacts by Channel

The majority of contacts are by telephone with the second highest being individual emails. Email requests for information and services are currently by their nature unstructured and work has started on transferring these requests to a generic web form with the generic email box address being removed from the website. It is notable that the majority of e-mails are going to individual e-mail addresses and not the generic addresses where customers are notionally directed to.

## Contacts by Channel



## Customer Profile

The data survey indicated that our customers are as follows:

Customers	%
Member of the public	62.3%
Business	19.8%
Partner Organisation	10.5%
Other	4.8%
Councillor	2.6%

The following table shows the scale of contacts that are dealt with by staff on a daily basis.

Number of contacts	Staff Dealing with number of Daily Contacts			
	Under 5	5 – 9	10-20	Over 20
Nos of staff	352	72	19	15

The data survey indicates that a relatively small number of staff handle in excess of 20 queries a day. In order to sense check the validity of the data we have also looked at the Phonex call data showing the number of external telephone calls coming into individual telephone extensions. In a standard customer service centre you would expect operatives

to be dealing with upwards of 40 contacts per day. It is notable that we do not have anyone falling into that category.

The Phonex data for February 2019 showed that 6 people dealt with over 20 telephone calls a day on average (excluding staff on the main switchboard). They are situated in the Housing Customer Services Team, Environmental Services and Building Control. However, the calls are only one element of the contacts received and it was not possible to sense check the number of emails received by these individuals. Administrative processes resulting from telephone calls also need to be factored into the time. Members of staff on the switchboard handled between 51 and 73 calls per day in February.

An important element of the analysis was to ascertain the level of 'failure demand' to quantify the amount of contacts that could be channel shifted away from face to face and telephones to self service or structured web forms.

### **Channel Shift and Digital First**

The value of the data is in understanding where customer demand can be channel shifted away from emails, telephone calls and face to face to the website and customer self service.

In particular it is useful to identify and clearly understand the nature of the 'failure demand'. This is customer demand that is not valuable as such to the organisation as it is wasted effort. An example of this would be progress chasing. Some service areas are already trying to find ways of avoiding such calls. For example, Planning experience a large number of these types of progress checking calls and are looking to their new IT system to enable the planning applicant to be automatically kept informed of particular milestones in the planning application process. The data survey findings will be shared with the Heads of Service and Service Managers and areas of 'failure demand' clearly understood. 'Failure demand' needs to be removed from processes or at least shifted away.

The corollary of failure demand is 'value demand' which is intrinsically useful to the organisation and resident. The most frequent, high number 'value demands' need to be analysed to discover whether they fall into the following tiers:

Tier 0 – website/self serve

Tier 1 – customer services team

Tier 2 – needs technical advice

Tier 3 – case management by technical officers

Over half the number of queries received by the organisation are in the form of emails which are unstructured. Officers often have to enter into an email conversation in order to find out all the relevant information. Each service area currently has too many contact options across the website i.e. telephone numbers and email addresses which need to be reduced to one single route. The use of a generic structured web form is currently being devised to reduce this inefficiency.

There are a large number of queries and transactions that could be channel shifted to the web. Payments and bookings are two areas which could be improved. These need to be identified, mapped and an implementation plan established. The barriers to implementing some of these processes may lie in the back-office systems. There is a great appetite from service managers to deliver more services on-line as this is a clear requirement from customers. A number of our current IT line of business applications such as in Planning, Building Control, Housing and Council Tax are currently in the process of being updated to

allow residents more opportunities to self-serve. However, in order to fully achieve digital first there will need to be more integration with back office systems. The establishment of a 'customer portal' is how many local authorities are achieving a self-service offering.

## **Technology**

### Customer Relationship Management (CRM)

In order to deliver efficient services to our residents it is essential to have good, reliable customer information. The project team are therefore recommending that a corporate CRM system is purchased. A specification has been prepared and the best procurement method is being considered.

### Master Data Management (MDM)

As a precursor to setting up a new CRM it will be necessary to ensure that the information we hold on residents is up-to-date and accurate. A MDM system enables us to build and maintain accurate records which are GDPR compliant.

### Website

The web site will need to be updated in order to meet the accessibility requirements by September 2020 and this will be included as part of the project.

## **Conclusion**

There are savings to be made from business efficiencies and an improved delivery model. The decisions to be made are how quickly can this be done i.e. when can the savings be realised and with least disruption whilst still maintaining a good level of service.

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## **Recommendation**

It is recommended that the Committee notes the contents of the report.

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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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