

Report to: **Executive**

Date: **1 December 2022**

Title: **Customer Access Strategy & Contact Centre Update**

Portfolio Area: **Council Services - Cllr Hopwood**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y / N**

Date next steps can be taken:

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## **RECOMMENDATIONS**

### **That the Executive:**

- 1. Approves the Customer Access Strategy principles and approach set out in section 3;**
- 2. Endorses the approach and actions to implement the Customer Access Strategy set out in section 4; and**
- 3. Notes the actions taken to improve the Contact Centre performance in Appendix A.**

### **1. Executive summary**

- 1.1 It is important that we make contacting our Council as easy as possible for all our residents, businesses and customers. The Council's ambition is that the majority of our residents will find it easier to contact the Council online. This will free up resources to support those who can't, either on the phone, face to face through an appointment-based system at the Council offices or even a home visit by our localities team.
- 1.2 Within the Council's Better Lives for All strategy "Delivering Quality Council Services" is a key theme. The strategy states that the Council will:

- i. Become a 'Digital First' Council
  - ii. Use new technologies to deliver tangible service improvements to residents and deliver efficiencies for the organisation
  - iii. Support those residents in most need to get access to the services they need
- 1.3 Action QS1.2 from the Better Lives for All delivery plan states that the Council will 'Develop a strategy setting out how our customers can access our services in the future, be that face to face, online or on the phone'
- 1.4 By the start of December, customer access options will include; Website/webforms, social media channels, email, telephone support, post, text (SMS) messages, and home visits for those with higher needs. Improving our support and the options to interact with customers.

## **2. Background**

- 2.1 The Council has been working towards transforming and offering innovative digital services for a number of years. This has enabled the Council to maintain core services within the budgetary constraints whilst still dealing with unexpected workload demands. This approach enables flexibility by allowing work and capacity to be moved around strategically as opposed to just reacting to unforecastable demand.
- 2.2 Core service delivery was maintained throughout the Covid period as we were able to switch to fully remote working and manage the additional demand being received via digital channels. Many councils stopped services or blocked whole access routes or responses from departments to deal with demand, but our forward-thinking approach meant that all Covid secure access channels remained open throughout the pandemic and no services were stopped. It also ensured we were well-placed to take on a range of new tasks efficiently and effectively including administering a bewildering array of different business grant processes with speed and accuracy.
- 2.3 New technology offers new ways to interact, and as they become mainstream it is important that we take advantage of the opportunities presented whilst still supporting those who need it.
- 2.4 In the past customer access was based on opening times and reception spaces, physical documents were created and received. Each job required a level of admin and manual rework that would be unsustainable now. By taking advantage of new technology, new approaches and new ideas to automate, we can continue to improve the service for residents who wish to make service requests themselves 24/7 via web-based tools, ensuring we retain the capacity to support those people who need it. The

challenges the Council now face require joined up thinking to meet customer expectations and work toward strategic goals.

- 2.5 Being accessible isn't just about maximising the number and type of contact routes available but about being effective and responsive with the ones you have. Whichever access route is chosen by the customer, the information we need to process their requests and the responses we need to give should be the same.
- 2.6 Our Customer Access strategy is underpinned by three key pieces of software that all work together to benefit staff and customers:
  - **Liberty Create** is our Low Code software package. This means we can easily build whatever application, tool, or process the Council needs. It combines front and back office functions into a seamless package. We currently use it as our customer records database (CRM), for webforms, workflow and processes, and automation. The flexibility means we have wide ranging plans to continue developing better applications to reduce overall workload. It links together with the other two key pieces of technology **Liberty Converse** and **Liberty Connect**.
  - **Liberty Converse** powers the telephony in our Contact Centre. It integrates with **Liberty Create** to show customer records automatically. It combines calls, emails, social media, and webchats into a single managed queue and has just started bringing Liberty Create processes to increase Contact Centre productivity.
  - **Liberty Connect** powers our webchats and chat bots. It integrates with **Liberty Create** and **Liberty Converse** to pass conversations from one route to another. We have plans to develop the integration enable even more customer self-service in the future with live access to information that would normally result in a call to the Contact centre.

### 3. Customer Access Strategy

- 3.1 Digital is not just about technology, it encompasses our behaviours, people and our culture and needs to be fully embraced as 'the way we do things' in the Council. It is our challenge to effectively engage with, understand, collaborate and better serve our customers and communities in digital first environments. We must use digital to create more engagement, inclusion and opportunities into every corner of our community. Our definition of a customer is any residents, supplier, business or partner that interacts with our services.
- 3.2 Our customer experience will be effortless, and digital first. Customers' first thought will be to go to our website with a question in mind, and come away with the answer they need, and wherever possible apply for the service they need online. No

phone call or email required, with no confusion as to what happens next.

3.3 In the past our approach to digital was that it was a choice for those that can, now our approach to digital is that those who can, should (and the vast majority already do). The advantages / disadvantages are clear, choosing a different contact route is likely to be more onerous for customers and reduces our capacity to support those who can't go online or for complex cases that need additional support.

3.4 A **Digital First** approach offers significant benefits:

- It is *better* for those that can:
  - The Council is always open 24/7, customers can transact with the Council at their convenience
  - Faster response
  - Consistent help and support
  - No queueing
  - Fewer errors
- It is *better* for those that can't:
  - Digital First creates capacity to support those who can't interact online.
- It is *better* for the Council:
  - Improved Customer Service
  - Consistent Customer Service
  - Better work management, prioritisation, and resource allocation
  - Improved and better automation
  - Cleaner data
  - Greater efficiencies

3.5 The Council's **Digital First Principles** are:

- A consistent approach to transactions so the experience is the same irrespective of access route chosen.
- A customer centric design - consider all customer access channels when designing or changing services
- Focus the website on transactions and enabling self-service, 24/7
- Guide contact to the most efficient route to free up capacity
- Utilise the capacity to provide more tailored support to those that need it
- Use our data to adapt services based on actual usage and demand

3.6 The **Outcomes** we will achieve are:

- Our customers are satisfied with our online services and would recommend a friend to use them

- All customer facing forms are available on our website
- Our website and forms can be accessed on any device
- All digital services will look and feel consistent as one South Hams service to the customer
- Services are accessible digitally 24/7
- By the end of March 2024, 80% of interactions with residents are via our online channels

#### **4 Progress made to date**

- 4.1 The Council has already undertaken a review of the operation of the contact centre. This has already demonstrated improvements in terms of the number of calls answered, improved answering times and reduced call waiting times. Appendix A contains further details of the actions already undertaken, the benefits realised and the actions that are planned over the coming months
- 4.2 In addition to the contact centre, several other projects are underway that will improve access, consistency, and offer improved services across all Council services for our residents and customers. These include the following service areas:
- Council Tax, Business Rates and Housing Benefits
  - Environmental Health & Licencing
- 4.3 A new website is currently being developed based on the technology used by gov.UK. Go live is anticipated before the end Q2 of 2023/24. The new website will provide clearer content and as result enable customers to access the service information they need quickly, improving the customer experience overall.
- 4.4 The reception area at Follaton House has been closed since the Covid pandemic. The cost and management overheads of operating a full-blown reception service are significant for a service that has seen a vast reduced demand due to changes in customer behaviour. However, it recognised that for a very small number of customers there is a need to offer more than a telephone number to call. Scoping of work has begun and is expected to commence from Q4 2022/23
- 4.5 Officers are investigating a virtual reception area, which would allow those customers that do visit the Council offices on an adhoc basis, to enter and speak to someone that can help them over a video interface, offer computer access to our digital services. Likewise, work is ongoing to offer an appointment-based system (similar to the existing planning service) across key services such as Council Tax, Housing and Housing Benefits. This work should be completed by the end of Q3 2022/23.
- 4.6 As of the end of November 2022, the Council has implemented the ability to send text messages to any customer from our Netcall Liberty Create system. Anybody using the system to

manage work can now send a text message to a customer either from within a process, or against the customer account. This could be used to; let a customer know we tried to call but couldn't get through, answer a simple question, request more info or a reply to a time dependent email, or send a link to a customer on the phone to a webform for them to fill in rather than have us do it over the phone. This ability has now been extended to Liberty Converse, meaning if a customer is in our call waiting queue and they are calling from a mobile, the system can automatically send a link to fill in an online form or useful information/FAQs, before the contact centre even need to answer the call.

## 5 Recommendations

- 5.1 Approve the Customer Access Strategy principles set out in section 3.
- 5.2 Endorse the approach and actions to implement the Customer Access Strategy set out in section 4.
- 5.3 Note the actions taken to improve the Contact Centre performance in Appendix A.

## 6 Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	N	N/A
Financial implications to include reference to value for money	N	All improvements managed through existing budgets
Risk	N	
Supporting Corporate Strategy	Y	
Climate Change - Carbon / Biodiversity Impact	N	
Comprehensive Impact Assessment Implications		
Equality and Diversity	N	

Safeguarding	N	
Community Safety, Crime and Disorder	N	
Health, Safety and Wellbeing	N	
Other implications	N	

**Supporting Information**

**Appendices:**

Appendix A – Contact Centre Improvement Actions

**Background Papers:**

None