

Finance and Corporate Services Scrutiny Board (1)

04 August 2014

**Name of Cabinet Member:**

Cabinet Member (Strategic Finance and Resources) – Councillor Gannon

**Director Approving Submission of the report:**

Executive Director, Resources

**Ward(s) affected:**

All

**Title:**

Customer Journey – Six Month Progress Report

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**Is this a key decision?**

No

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**Executive Summary:**

This report details the first six monthly progress report together with the initial Equality and Consultation Analysis as requested by the Board at the meeting on 13<sup>th</sup> January 2014.

**Recommendations:**

The Finance and Corporate Services Scrutiny Board (1) are recommended to consider the content of the report, and forward any comments or recommendations to the Cabinet Member (Strategic Finance and Resources).

**List of Appendices included:**

None

**Other useful background papers:**

None

**Has it been or will it be considered by Scrutiny?**

Yes - Finance and Corporate Services Scrutiny Board (1) – 04 August 2014

**Has it been or will it be considered by any other Council Committee, Advisory Panel or other body?**

No

**Will this report go to Council?**

No

## **Report title: Customer Journey – Six Month Progress Report**

### **1. Context (or background)**

At the meeting of the Finance and Corporate Services Scrutiny Board (1) on 13<sup>th</sup> January 2014 the Board considered a report of the Executive Director, Resources which reconfirmed the vision and strategy for the way the Council delivered customer services, which would underpin the changes required prior to the opening of the single Customer Services Centre in Broadgate House by 2015. The programme to deliver the changes to customers facing property, ICT and the Council's ways of working was called 'Customer Journey' and this covered every aspect of the Council's interactions Coventry citizens.

It was resolved that:

- (i) The Cabinet Member (Strategic Finance and Resources) be requested to: (1) ensure that an equality impact analysis is carried out as soon as possible and (2) ensure that the equality impact analysis addresses the needs of people with dementia.
- (ii) That six monthly progress reports on the Customer Journey be submitted to future meetings of the Board.

This report details the first six monthly progress report together with a summary of the initial Equality and Consultation Analysis as requested by the Board at the meeting on 13<sup>th</sup> January 2014. The full ECA is attached in Appendix A.

### **Progress Update**

A considerable amount of progress has been made over the past six months over a number of areas. These are detailed below:

#### Channel Strategy:

The Channel Strategy provides a framework for a co-ordinated approach to encourage the movement of customers to cheaper more cost effective channels.

#### Benefits to the Customer

- Customers will have a greater choice and can contact the Council through a range of channels.
- Customers will receive a consistent customer experience across all channels.
- Our Contact Centre and Customer Services Centre will have the ability to provide depth of service and first time resolution; thus improving the customer experience and the perception of the Council.
- Streamlined processes and reduced manual intervention will enable the Council to respond more quickly to customer requests.

#### Benefits to the Council

- Staff will be better placed to provide high value support and advice.
- More centralised control and standardisation makes return contacts for customers easier.
- The Council will develop a greater understanding of its customers and their needs.
- Research shows that the average cost of a face-to-face transaction is £14 whilst a telephone transaction is £4 and self service is 20p.

### Benefits to the Employee

- Customer satisfaction drives employee satisfaction and could ultimately change behaviours; i.e. reduced absenteeism, lower staff turnover, willingness to recommend services, higher levels of productivity.
- Shared Customer Insight data will allow closer team working and collaboration.
- Professionals who currently spend time dealing with simple transactional requests from customers are free to focus on higher value service delivery activities.

The following diagram shows current channel usage and planned future channel usage. It includes an overall reduction in contacts through demand management of 10% annually for years 2014-2016.

Channel	2013	2014	2015	2016	2017
Self Serve	1,400	263,507	415,023	480,241	624,313
Contact Centre	397,289	592,890	652,179	533,601	307,354
Face to Face	374,107	263,507	118,578	53,360	28,814
Other (contacts currently handled in back office that will migrate to Customer Services)	691,131	197,630	nil	nil	nil
<b>Total contacts</b>	<b>1,463,927</b>	<b>1,317,534</b>	<b>1,185,780</b>	<b>1,067,202</b>	<b>960,481</b>

Therefore, it is clear we need to reduce demand overall by half a million contacts over the next four years, and shift all first point of contact into customer services, primarily to self serve, then the contact centre and finally face to face when it best suits the customer and/or the service.

### Automated Telephony

- Automated Telephony provides a set of purpose built scripts to direct customers to the information that they need. These are designed on the basis of a number of local authorities' experience over a number of years to focus on the key questions that customers may have. Customers are also able to leave information, and request forms through the automated 24hr service.
- There are 3 services in the Council which have already benefitted from Inform. Council tax went live first in March, in order to help with some of the extensive volumes seen around the annual billing cycle and since then the Benefits service has also adopted the service. The Elections team also used Inform in the run up to the local elections in May which greatly reduced the workload demands within their team at the busiest time of the year.
- At times of high demand, customers may be held in a queue even with a small or simple enquiry (such as requests for application forms or postal votes). The scripts have helped those customers get the information that they need without necessarily needing to wait for an Officer to become available. We have seen the abandonment rate of council tax calls reduce by over 50% and a significant reduction in the overall number of calls needing to be answered by an Officer across Council Tax and Benefits. 80% of calls to the elections team in the run up to the local election were dealt with by the automation. This has resulted in financial savings for the Council.
- We need to keep improving the service and so ongoing script reviews are underway with staff across Benefits, Council Tax and Customer Services to ensure we continually develop our scripts and tailor the service for any seasonal changes in specific services. As we continue with the Customer Journey Programme we will also be considering other Council services that could benefit from automation within their telephone service.

### Design of services:

- The Project Team is meeting with each service to understand the current volume of customer contact (by telephone, web and face to face) as well as the reasons for customer contact.
- Each service is shown the organisational targets to shift customer contact away from costly face to face interaction towards more efficient web contact.
- Assistant Directors are all involved at the start of the process, service experts then work with the project team to collect the relevant data and then the opportunities are discussed in a full workshop. Recommendations are fed back to the relevant AD to agree an action plan between the project and each service.
- Common themes to date are:
  - Manual handling of customer related paperwork/payments
  - Significant levels of avoidable contacts / latent demand
  - Opportunities and desire to work differently
  - Importance of relationship between Customer Services & service delivery.

### Design of building:

- The specification for the renovation of Broadgate House has been completed following the appointment of an architect firm, Frankhams.
- Floorplans and design principles have been shared with key services so that specific requirements can be considered at this early stage.
- This workstream is currently in the feasibility stage which means that full cost reports need to be considered before approval is granted by through the Kickstart governance process.

### Web:

- Jadu, the developers of Coventry City Council's current website, will be developing a new website which is focused on the transactions residents will be able to have with the Council.
- Staff and Elected Members were invited to attend Website Workshops in June 2014 to discuss how to best categorise tasks and or residents, navigation of the site and look and feel of the site. These views were fed into the design specification for the website development.
- Jadu are currently developing mock up pages according to this design specification and feedback from the Project Team since.
- A user group will be asked to test the website and provide feedback before it is formally switched over.
- The new website is expected to be fully operational by the end of 2014. Services are being supported to review current web content and update according to principles provided by the Insight Team, supporting Customer Journey principles.

### ICT:

- ICT are currently in contract negotiations with the preferred provider for a Customer Portal following an extensive procurement exercise.
- The first services that will be integrated with the Customer Portal are Council Tax, Housing Benefit and Streetscene.
- These services will be tested internally by Customer Services before being accessible to residents through the website by the end of 2014.

## **2. Options considered and recommended proposal**

2.1 There are no options contained within this report.

### **3. Results of consultation undertaken**

- 3.1 The project has informed a number of groups about the proposed changes over the past six months and this will continue for the duration of the project. There has been a significant amount of engagement with staff across the organisation involved in customer contact and/or processing customer requests.
- 3.2 A number of briefings have been held for Contact Centre staff to ensure they are made aware of what is happening and have the chance to ask questions. These will be held regularly throughout the lifetime of the project.
- 3.3 Revenues and Benefits staff have been regularly briefed throughout the introduction and implementation of Automated Telephony.
- 3.4 All staff, and Elected Members, will have the opportunity to attend a series of briefing sessions as part of the Kickstart – One Year On communications. Attendees will have a chance to find out current progress, ask questions and provide feedback to the project team.
- 3.5 There have been two meetings of the Member Champion Group to keep attendees up to date on project progress and to discuss emerging issues to help shape future progress.

### **4. Timetable for implementing this decision**

- 4.1 The key dates are the introduction of a new website and customer portal by the end of 2014 and the opening of Broadgate House in September 2015.
- 4.2 The progress of the project is monitored through the Customer Journey Project Team and reported up through the Kickstart governance process. This is supported by the Members Champion Group and regular briefings to Cabinet Member.
- 4.3 The project will be monitored for success against the targets in the Channel Shift Strategy and the contributions it can make towards the Kickstart savings target.

### **5. Comments from Director of Finance and Legal Services**

- 5.1 Financial implications  
The costs of Customer Journey are built in to the overall Kickstart Programme business case, approved in June 2013. The Programme will be expected to make significant savings towards the Medium Term Financial Strategy.

- 5.2 Legal implications  
None.

### **6. Other implications**

None.

#### **6.1 How will this contribute to achievement of the Council's key objectives / corporate priorities (corporate plan/scorecard) / organisational blueprint / Local Area Agreement (or Coventry Sustainable Community Strategy)?**

No update following the report in January 2014.

#### **6.2 How is risk being managed?**

No update following the report in January 2014.

#### **6.3 What is the impact on the organisation?**

No update following the report in January 2014.

The introduction of Information and Communications Technology to enable Customer Journey Programme has been detailed above in section 1.

The programme will require changes to the way that the Council works. Once the detail of these changes is designed consultation will be required with staff and Trades Unions in line with the Council's policies.

#### 6.4 Equalities / ECA

In summary, the programme level ECA focuses on the principles for increasing the use of internet based channels to contact the Council improved face to face support within the single Customer Service Centre at Broadgate House.

The analysis shows that the project is anticipated to have positive equality impacts because it is increasing the ways that residents can contact the Council to 24/7 online access. The single City Centre Customer Service Centre will be fully DDA compliant with increased opportunities for residents to self-serve.

Many Coventry residents have access to, and use, the internet on a daily basis. Many other local authorities have made this shift and local surveys show that Coventry residents have a high propensity to interact with council services online. By increasing self-service and online options for those that can means that remaining resources can be better focused on the smaller proportion of residents who cannot.

A fuller summary of the potential impacts and mitigations is detailed in the table below:

Protected Characteristic	Potential Impact and mitigation
<b>Accessibility of Web</b>	<p>The website will be built to comply with all of the Priority 2 ('AA') accessibility checkpoint across its web presence, as established in the World Wide Web Consortium's (W3C) web accessibility initiative (WAI). The WAI promotes usability and accessibility for people with disabilities. The W3C promotes good practice amongst the web community via initiatives like <a href="#">WAI Web Content Accessibility Guidelines 1.0</a>.</p> <p>Several alternative display options will be available which should help people to view the website in a style that is easiest for them to read. A <a href="#">Web Accessibility Toolbar</a> has been developed by the Accessible Information Solutions (AIS) team of <a href="#">Vision Australia</a>. It aids quick access to a variety of accessibility tools and will be used on the website. The website will be <a href="#">Text to Speech enabled using BrowseAloud</a> and will be <a href="#">automatically translated using Browsealoud</a> if needed.</p> <p>The push towards self-serve and online options will mean the ability to offer quality face to face and telephone interaction with customers who are not able to engage with us through our preferred options will be improved.</p>
<b>Age</b>	<p>Coventry residents have a cross section of ages but is predominately a younger population so the offer of 24/7 access to services will be a benefit to our customers.</p> <p>Shifting a volume of customer enquiries to self-serve options will provide the capacity to support our most vulnerable customers, some</p>

	of who will be drawn from the older age population, through face to face contact in the customer service centre which will be easily accessible and a single city centre location.
<b>Race &amp; Ethnicity</b>	The city's overall population has a self-identified BME population of 33%, the proposed changes will not disproportionately impact on race and ethnicity. Additional support will be available from the central Customer Service Centre for people who require it, for example those who do not have English as their first language will be supported to access services through the provision of Language Line and offering pre booked appointments, which will enable us to arrange appropriate support. Support is also available through the provision of Adult Education courses such as English.
<b>Disability</b>	<p>34,125 (26.5%) households in Coventry contain someone who describes themselves as having a disability or long-term health problem, over 1 in 4 households. Moving services online and into the contact centre will provide people with disabilities with greater choice for completing their business with the council which could be more convenient.</p> <p>If they are not able to undertake their business online or via the telephone they will be able to visit the Customer Service Centre which will be fully DDA compliant where they will be able to access services online, with the support of a customer service assistant. The wider Kickstart programme have been engaging with the Disabled Employee Network on a regular basis to keep them informed about the proposed developments. Once the feasibility/design stage has been approved for the CSC then engagement will start with stakeholders from this protected group specifically around accessibility issues.</p> <p>Technology will be provided to enable deaf customers to undertake their business with us</p>
<b>Gender</b>	<p>Coventry's population is 50% male and 50% female, therefore neither group will be disproportionately impacted as there is no dramatic gender bias towards the services which we will be providing as part of the Customer Journey.</p> <p>Women are predominately lone parents and the shift towards 24/7 online self-serve will mean greater choice for this group and the provision of a single city centre based Customer Service Centre which is fully DDA accessible will benefit this group.</p>
<b>Pregnancy/Maternity</b>	There are no specific issues that will impact on pregnant women as part of the customer journey. The customer service centre will have baby changing facilities so will support parents with small children. Space will be provided should women wish to breastfeed. Online access to services available 24/7 is likely to be much more convenient to this protected group as they will be able to undertake more activities online at a time that suits them
<b>Sexual Orientation, Religion/Belief, Sex, Gender reassignment</b>	No specific issues were identified for these protected groups.
<b>People experiencing deprivation</b>	Customers will be able to access more city council services via the online options rather than having to travel into the city centre, providing them with an enhanced service. There are a significant number of venues across the city where free wifi is available, including supermarkets, coffee shops and the whole of the city centre via

	Coventry City Council's free wifi. This would enable any person to log on to the website to carry out their business with us.
<b>Vulnerable People</b>	It has been agreed that the Customer Service Centre will be a Designated Safe Place to help people with learning disabilities to feel confident and safe when out in the community, knowing that assistance is available if required via staff in the Centre.
<b>Dementia Friendly</b>	Coventry City Council has committed to working towards Coventry becoming a dementia friendly community, by completing a Dementia Action Alliance action plan. There are a number of Dementia Friends champions across the Council, the Customer Service Centre will be dementia friendly and will include dementia friends to support individuals.
<b>Complex Needs</b>	Service users - Face-to-face interaction for customers with complex needs and for those that are least likely to channel shift, providing access to a full range of services, will continue to be available from the Customer Service Centre in Broadgate House. This will ensure that the most vulnerable people in the City are not excluded from gaining access to Council.

#### 6.5 Implications for (or impact on) the environment

None.

#### 6.6 Implications for partner organisations?

The Project Team have met with representatives from Whitefriars, Coventry Law Centre, Coventry CAB, and Voluntary Action Coventry to explain the changes and key dates. The group will continue to meet to discuss potential opportunities, communication of key messages to staff within partner organisations and provision of support for residents currently unable to use internet based services.

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