CUSTOMER SERVICE STRATEGY

Report by Chief Financial Officer

PURPOSE

1.1   The purpose of the Report is to seek approval of the updated Customer Service Strategy.

EXECUTIVE SUMMARY

2.1   The Customer Service Strategy seeks to embed a culture of good practice across the Comhairle where staff and customers are clear about the standards of service they can expect to receive. Customers dealing with the council, should have a common experience and level of service regardless of which service they are seeking or how they choose to make contact. Achieving this requires the development of common processes, systems and care standards across the whole council.

2.2   The strategy is aligned to both the National and Local Digital Strategy and aims to design services so that digital becomes the channel of choice, so that most customer enquiries and transactions can be handled through digital channels. The Comhairle will launch a new Website, Online Forms package and Telephony solution to provide the underpinning technology to deliver against its aims and objectives.

2.3   In conjunction with this, a multi-disciplinary team will be formed to support service areas reassess their responsiveness to customer contact. The team will work with service areas to review the channel shift initiatives outlined in the strategy, adopting those that are relevant to their service. A key component of this will be to ensure that no-one is digitally excluded and the appropriate channels remain available for those who would use other methods of contact.

2.4   The updated Customer Service Strategy aims to redesign services to make them simple to deliver and easy for customers to access. We aim to optimise processes to remove delay and duplication and gather feedback from customers to help us design our services better.

2.5   Despite the financial challenges facing services, we seek to maintain standards by encouraging self-service, resolving more enquiries at initial contact, and deploying a case management system to ensure work is captured, allocated and responded to appropriately. Such a model releases officers to focus on their core competence, resolving more complex enquiries, or assigning their time to those customers who have specific needs.

2.6   Implemented well, the updated strategy can deliver significant business transformation in terms of channel shift, process change, and operational efficiency.

RECOMMENDATIONS

3.1   It is recommended that the Comhairle approves:

(a)   the updated Customer Service Strategy set out in Appendix 1 to the Report; and
(b)   the Customer Care Standard as set out in Appendix 2 to the Report

Contact Officer: Malcolm MacPherson, Customer Service Manager
Appendices: Appendix 1 Customer Service Strategy
                          Appendix 2 Customer Care Standard

IMPLICATIONS

4.1   The following implications are applicable in terms of the Report.

Resource Implications	Implications/None
Financial	There are no financial implications associated with this report.
Legal	None
Staffing	None
Assets and Property	None
Strategic Implications	**Implications/None**
Risk	There are no risk implications associated with this report.
Equalities	An Initial Impact Assessment was undertaken. There are no identified equalities issues associated with this report.
Corporate Strategy	Digital investment delivers outcomes for the community.
Environmental Impact	None
Consultation	There is no external consultation associated with this report. No reduction in service is planned, with more options to access services intended.

COMHAIRLE NAN EILEAN SIAR – CUSTOMER SERVICE STRATEGY

INTRODUCTION

1.1   The aim of the Customer Service Strategy is to develop common standards of service. Customers dealing with the Comhairle should have a common experience and level of service regardless of which service they are seeking or how they choose to make contact. Achieving this requires the development of common processes, systems and standards across the whole council.

KEY STRATEGIC AIMS

2.1   To provide a consistent, uniform approach to customer service delivery, guided by our Customer Care Standard.

2.2   Design services so that digital becomes the channel of choice, and most customer enquiries and transactions can be handled through digital channels.

KEY OUTCOMES

3.1
- We will analyse our processes so that it is simple and efficient for customers to complete transactions
- We will design our website content to ensure our digital information is accurate, accessible and up to date.
- We will provide a single point of contact for a range of services, and, where possible, provide first-time resolution.
- We will serve more residents with the same resources, increasing efficiency through the use of digital platforms.

OPERATING MODEL

4.1   We can be more efficient by directing all initial enquiries, service requests, payments, appointments and bookings through a single point of contact. Online self-service provides a fast response to the most common requests or services. It enables officers to focus on more complicated issues or spend time with those customers who have specific needs. Such a model releases, increasingly scarce, specialist officers to focus on their area of expertise and be of most value to our customers.

With the launch of a new Council website, an Online Forms package and Telephony solution, this provides the underpinning technology to deliver the aims and objectives of both the Customer and Digital strategies. They provide the means with which to design and create single end to end multi-channel processes that improves the customer experience and drives digital engagement.

WEBSITE

4.2   The website will serve as the main access point for the council's services for simple information and transactional services. If customers cannot self-serve, officers will use the website as their information source if contacted through alternative methods. Officers will have reliable and up-to-date service information at their fingertips, enabling them to respond to customers enquires and requests quickly, efficiently and consistently. The solution will enable them to respond to a wide range of questions,

drawing on specialist knowledge where necessary. The website is supported by a powerful content management system, that, once embedded, will be opened out to service areas to enable identified editors to update contact with the appropriate oversight of the Web Support team.

ELECTRONIC FORMS

4.3   eForms will be implemented throughout the Council and will be the default method for capturing customer interactions. eForms enable greater process automation and improvement, helping remove steps such as re-keying of information, photocopying and the printing out of forms. The platform solution includes:

   o   **Service Designer:** powerful forms, workflow and integrations which can be completely designed and built by the Council.
   o   **Customer Portal:** single window into the Council, providing 24/7 access to online services and data.
   o   **Staff Portal:** Back-office tasks and workflow, as well as internal forms and processes. Potential for out-of-the-box integration solution to Outlook for email, One Scotland Gazetteer, Payment connector, SMS gateway.

In line with the operating model, where a follow up action is needed, officers will populate information on the form, on behalf of the customer and direct that to the relevant service area.

CASE MANAGEMENT/WORKFLOW

4.4   The operating model ensures that, irrespective of method of contact, any follow up action can be captured in a case management system. This will provide an audit trail and ensure assigned actions are visible and can be monitored. A review of the existing Open-Source Ticket Request System (OTRS) case management will be undertaken in tandem with the workflow options of the new Online Forms solution. The model will allow information to be sent electronically to the relevant person in the organisation to complete their individual task. Crucially, this will have a reporting capability and provide meaningful management information to service areas.

TELEPHONY

4.5   Promotion of the website and use of online forms are designed to reduce the volume of telephone calls to service areas. Where calls are made to the switchboard or customer services, the aim is to resolve the enquiry at first point of contact. In line with the operating model, if that is not appropriate, the service request will be assigned to the case management system via an online form first. Calls will only be transferred if these options are exhausted.

As part of the implementation of the new telephone system we will undertake a review of all existing external and internal phone numbers. Immediate focus will be on those services with the highest incoming volumes and how advances in technology may help manage high demand.

GOVERNANCE

5.1   The adoption of a modern technology platform and the ability to take a customer focussed approach to development of services, will require a different way of working to be developed within the Council. A multi-disciplinary team will be required to undertake resulting service reviews and build new processes within the platform. The requirement is to deliver significant business transformation in terms of channel shift, process change, and operational efficiency. There is a substantial amount of work required to create the end-to-end online services. This will require considerable input from Service Areas. The service redesigns and system development will necessitate further resources to complement the business support function within ICT.

IMPLEMENTATION APPROACH

6.1 It is proposed to work with service areas to identify potential channel shift and process improvements using the methodology outlined below. Initial use of the online form assessment will help gain a collective understanding of what information it being sought and help prioritise implementation of service area reviews.

The team's purpose would be to support service areas reassess their responsiveness to customer contact, eliminate process failure and unnecessary cost through business analysis. This would include

- Review service delivery across all channels from In-Person to Self-Service.
- Examine the use of the technology deployed to support the service.
- Review processes that interact with internal customers first, to mitigate external risk and embed the operating model principles.
- Review methods of measuring Customer Satisfaction or collecting feedback.

CHANNEL SHIFT INITIATIVES

7.1 Moving transactional content online will release specialist staffing resources to deal with more complex enquiries or enable them to spend more time with those that need extra help.

It is proposed that the implementation team work with service areas to review the channel shift initiatives outlined below, adopting those that are relevant. The principles supporting the initiatives adhere to three basic principles:

- **Simple** – the preferred methods of contact for the Comhairle should be the most user friendly, so as to drive a shift in customers' behaviours.
- **Cost Effective** – we determine ways to deliver services effectively but at a lower cost.
- **Inclusive** – we do not disadvantage any individual by limiting the choice of contact methods available.

AVOIDABLE CONTACT – COST AVOIDANCE

7.2 Any contact which could be avoided, does not need to be shifted to a more cost-effective channel. The team will work with the service area to:

- Eliminate process failure and unnecessary cost through business analysis, management information and customer feedback.
- Design processes that reduce the need for customers to contact the authority multiple times to complete one transaction.
- Where evidence exists within the council, we should avoid asking for customers to provide it again, when applying for a service.
- Inform customers of what can be done electronically when they phone or visit us with a specific type of enquiry.
- Cleary state service standards with customers. Be proactive in explaining any delay and providing a new timescale.

WEB

7.3 By promoting the website as the main access point for the council's services for simple information and transactional services:

- Ensures that the website is a primary source for all council communications.

- Develops and promotes the use of online consultation.
    - Ensure accountability agreed for managing the web site.
    - Ensure cross council editors update service specific content on a regular and timely basis through the Content Management System.

TELEPHONE

7.4
- Agree steps for telephone enquiries to be gradually routed through Customer Services.
- Increase the number of customer queries resolved without transferring.
- Agree a limited number of direct dial phone numbers that provide direct access to the appropriate service area.

PAYMENT

7.5
- Design services so that prepayment is built into service requests where appropriate.
- Develop a seamless application and payment process by linking the form completion and payment processes and identify forms where payment integration can be added.
- Review all major payment channels and shift customers to the most cost-effective method of payment.
- Promote payment by direct debit, web and telephone payment over the face-to-face channel.
- Review accepting cash and cheque as payment methods.

FACE TO FACE

7.6
- Implement an Appointment System, where appropriate, and as such this becomes the default position for the Comhairle.
- Undertake process reviews to identify potential channel shift to a less costly channel if appropriate.
- Seek opportunities to share face-to-face provision with other organisations.
- Review accepting cash and cheque as payment methods.
- Promote increased assisted access to the council's website through our face-to-face staff (e.g. Using libraries for online applications).

DIGITAL INCLUSION & ACCESSIBILITY

7.7
- The strategy seeks to help service areas understand and tackle the different barriers to equal opportunities for different groups of people.
- Provide public internet access at key locations, e.g. Libraries, community hubs.
- Widely advertise our full choice of contact channels, particularly to hard-to-reach groups.
- Provide a translation service to allow easy access to the authority for all, through the face to face and telephone channels.
- Carry out an Equality Impact Assessment of the channel mix and make reasonable adjustments to the channels as needed.

POST & EMAIL

7.8
- Provide a complete range of online forms to reduce the number of forms sent by post.

- Integrate email and postal distribution lists in order to give people the choice to opt for email only.
- Reduce the amount of internal post by encouraging staff to email or scan correspondence.
- Include web links to the appropriate web page when responding by email.
- Publish a group email address for the initial customer contact, shared by all relevant staff in the service area.

CONCLUSION

8.1 Customer expectations are continually changing, and councils are striving to make efficiencies. We aim to address these challenges by making the best use of technology to deliver cost effective services to customers.

The Customer Service strategy aims to redesign services to make them simple to deliver and easy for customers to access. We aim to optimise processes to remove delay and duplication and gather feedback from customers to help us design our services better.

The underlying principle will be of consistency and to embed a culture of good practice across the Comhairle, where staff and customers are clear about the standards of service they can expect to receive.

COMHAIRLE NAN EILEAN SIAR - CUSTOMER CARE STANDARD

We are committed to the consistent delivery of good customer service. We aim to make services digital by default which are available 24/7, whilst making sure those who do not use digital services can still contact us through traditional methods.

Letters, E-mails and Electronic Forms

- When writing to us you can expect a full reply to your letter or email within ten working days or a progress report with timescales*
- The contact details of the officer responsible for dealing with your query will be included in correspondence.
- Members of the public who correspond in Gaelic will receive a reply in Gaelic.

Telephone

- We aim to answer telephone calls within 20 seconds. If lines are busy or staff are unavailable, you may reach voicemail to ensure your enquiry is captured.
- We will converse through Gaelic or English in accordance with the customer request. A translation service will be made available as required for other languages.
- When we pass your enquiry to a specialist, we will pass on your personal details and the nature of your query so that you do not have to repeat it to another person

Face to Face

The Comhairle operates an appointment system for face-to-face services.

When you visit our offices, you can expect that:

- Officers to be welcoming, polite and helpful.
- Keep to pre-arranged appointment times and let you know in good time if appointments are running late or have to be rearranged.
- Provide consistent, up to date information on council services.

When we visit you at home you can expect that:

- Visiting staff will identify themselves to you with their Comhairle photo identity badge
- We will inform you where an appointment is running late or has to be cancelled
- We will inform you of the actions resulting from the visit and timescales
- We will give you a clear explanation of the nature of a visit that is made without a prior appointment

Complaints

If we fail you on any of the previous standards and you wish to make a complaint, you can expect:

- Respect for your opinions and empathy for your views
- An acknowledgement receipt within 3 working days
- A full reply in 20 working days, or details of progress and timescales for a further response

Complaints Procedure

You can Help Us By

- Letting us know if you have any needs that may affect how we provide your service
- Being patient and polite when you talk to us
- Contacting us early if you need to rearrange an appointment
- Telling us what you think about our service and how we are performing

Some services have statutory response times which may differ from those identified in these standards. Service specific details will be provided on our web pages where applicable.