

**Report of the Cabinet Member for Citizen and Community
Engagement and Democracy**

Cabinet – 1 July 2014

CUSTOMER CONTACT STRATEGY

Purpose:	To agree a customer contact strategy.
Policy Framework:	None
Reason for Decision:	To improve the way we develop and provide modern and efficient customer services.
Consultation:	Legal, Finance, Access to Services and the Customer Services project team.
Recommendation(s):	It is recommended that: 1) The Customer Contact strategy and action plan is approved.
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1. Introduction

- 1.1 The Council is working to make Swansea a prosperous place, where people have choices and opportunities to improve their lives.
- 1.2 Like all councils, Swansea faces significant challenges to maintain and improve services in the face of significant reductions in the amount of funding and resources available.
- 1.3 Swansea has a population of approximately 240,000 and significant daily inflows of approximately 30,000. The latest Welsh Government population projections suggest Swansea is projected to grow by 13.1% (31,200) by 2036; which will give rise to a greater demand for the services that we provide as a council.
- 1.4 At the same time, the way customers want to access services and information is changing and the potential of new technology to

transform the way we do business and reduce costs has increased dramatically.

- 1.5 As a result, the Council needs to continue to review and develop the ways that we provide access to our services so that we are able to deliver cost effective, good quality services to our customers through a variety of channels.
- 1.6 This strategy, set out in an action plan at Appendix A, has been developed in line with the Council's Policy Commitments and the *Sustainable Swansea Fit For the Future* initiative, including our work on innovation, demand management and income and charging.

2. Overview of current position

- 2.1 The Council has modernised and reconfigured aspects of its customer services and contact in recent years. Some face to face services have been centralised at the Civic Centre, a number of call centres have been established and more transactional functions have been made available through the council's website.
A customer services standard, *The Swansea Standard*, has been implemented, resulting in positive feedback from customers.
- 2.2 There is currently no overarching strategy or single service providing a strategic lead or co-ordinating customer services across the council. As a result, services have introduced service-based initiatives. A corporate framework is essential to maximise the potential benefit for customers and to reduce costs.
- 2.3 We also need to understand more about our customers, why they contact us and how they would prefer to do business so that we can better meet and, where possible, reduce demand.
- 2.4 **Face to face contact**
- 2.5 Customers have access to staff and services at a large number of our venues. The Civic Centre contact centre deals with 105,000 customers each year. Benefits staff members are trained to work across three channels and their work is rotated between these functions.
Elsewhere there are high volumes of face to face contact in venues including libraries, leisure centres and district housing offices. These venues largely provide their own services with some sign-posting to other services within the council.
- 2.6 Current issues include long queues in the contact centre during peak times, limited customer services in communities and a lack of wifi and PCs available to the public to improve self-serve to help reduce queuing times.

2.7 In addition, having several different locations in some communities mean that customers are confused about where to go for support and they may have to go to more than one office to access council services. There are opportunities to provide information and advice to residents which may help them to access services or to make choices.

2.8 **Telephone contact**

2.9 We receive in excess of 800,000 telephone calls via the central switchboard, specialist call centres and several high-volume areas.

2.10 The council's main switchboard receives more than 330,000 calls annually. There are also a number of call centres operating in various departments, including environmental health (123,000 calls), council tax (76,000), benefits (75,000), housing repairs (66,000) and blue badge (16,000).

2.11 There are high call volume areas with predominantly operational or back-office staff such as registrars (80,000) adult services in-take (31,000) child and family (26,000), planning (16,000) and parking (8,000). In addition, there are several hundred published telephone numbers which means calls are coming in across the Council.

2.12 Current issues include variances in call monitoring and management, response rates and waiting times vary across call centres, call centres do not have the ability to share resources to manage peaks and troughs, out-of-hours and emergency arrangements vary and the main telephone and voice recording systems need replacing. In addition, some services have processes which create large call volumes.

2.13 Customers are often unable to have multiple queries dealt with via a single call. As with face to face contact, we are missing the opportunity to provide additional information, advice or guidance.

2.14 **Digital services**

2.15 The current council website is used by 1.4 million visitors per year, viewing around 3.2 million pages. This is approx 8,600 page views per day, which can increase during extreme weather conditions to over 32,700 pages viewed. The website was previously updated in 2008 and is running on an old server. Investment has been made to upgrade the latest version of the software including installing new servers to make the site more stable. A new content management system has been procured to improve the content and structure to ensure it is focused on customer needs and ease of use. The new website is due to "go-live" in June.

- 2.16 A review of the Council's payment system has been undertaken to resolve some ongoing technical issues with the Council's cash-receipting system. The review will allow further roll-out of the e-payments module which will allow further website development to make it easier for people to purchase and pay online.
- 2.17 Social media is widely used in departments to highlight events, council initiatives and campaigns. It is increasingly being used by customers to report faults. In addition, mobile apps are used such as the Connect Swansea's Binfo which provides rubbish and recycling collection information.
- 2.18 Current issues include the resources available for the main council website upgrade, with StaffNet also needing to be moved to the new content management system. Only basic online payments can be made currently because e-payments have not been rolled-out across the full range of council services. Social media is not handled by customer services teams and the use of apps and other technology such as LiveChat needs to be developed corporately.
- 2.19 In summary, our digital offer is insufficient to meet both our customers' expectations and what is required to deliver modern and effective transactions.

2.20 **Out-going contact and communications**

- 2.21 The Council uses a range of methods to contact and communicate with customers, including letters, email, social media and text messaging. Current issues include a lack of customer information and no central database, with post often being the first choice for out-going communication, inefficient print to post handling and an inconsistent approach to bulk emails and text messaging
- 2.22 In addition to these issues, the strategy also considers customer insight and technology and infrastructure which are set out in Appendix A. Improved customer insight will help us to better understand our customers, their profiles, trends and preferences. This will enable us to be more efficient in the way we deal with customers and to better target services towards customer needs and preferences.

3. **Customer views and trends**

- 3.1 During consultation in the past two years, customers have told us that the two most important influences on their view of the Council are the services they receive and contact with council staff.

- 3.2 In response, and following further consultation, we launched the *Swansea Standard* setting out how we'll treat our customers at the point of contact. The public response has been positive.
- 3.3 Additional research carried out with Swansea Voices in October 2013 considered current and future customer contact with the Council. Swansea Voices is the Council's citizen's panel which reflects the make-up of Swansea's population aged over 16 years.
- 3.4 The vast majority of residents (85%) have access to the internet. Of these, 96% access it at home. The other main ways for residents to access the internet are 'out and about' such as using a mobile phone or other portable device (45%), in work (43%) or in a library (19%).
- 3.5 More than 90% of residents use the internet to buy goods or services and three quarters book holidays and pay bills online.
- 3.6 When compared to the latest National Survey for Wales 2012-13, more people in Swansea have access to the internet than the all-Wales figure (85% compared to 73%).
- 3.7 The vast majority (86%) own a mobile phone and 56% use mobile apps.
- 3.8 How customers report faults/request a service:

Method	Phone	email	Face to face	Online form	Social media	Mobile apps
Current	87%	38%	24%	20%	5%	2%
Preferred	72%	56%	27%	26%	10%	10%

- 3.9 How customers receive information:

Method	Post	Web/online form	email	phone	Social media	Mobile apps
Current	61%	50%	22%	22%	8%	1%
Preferred	48%	46%	47%	18%	16%	9%

- 3.10 Customers want more information and services provided online, including: requests for recycling bags; parking fines and the ability to report faults. However, some of the barriers include computer access, IT skills and limitations with the current website.
- 3.11 The Government has launched its Digital by Default strategy encouraging public services to be delivered online or by other digital means. The Council has a 12-month digital inclusion project running until December 2014 to support groups such as the economically inactive and older people to use computers and online services. A

digital inclusion strategy is currently being developed to build upon this project and to ensure more residents are supported to use online services

- 3.12 A recent study by the Society of IT managers (SOCITM) found that the average cost per customer contact was:
- Face to face £8.60
 - Phone £2.83
 - Online 15p
- 3.13 A number of councils in Wales and England have modernised their customer contact through the use of technology, digital services and consolidating phone and face-to-face contact. The structure and models vary and we can learn from their experiences.
- 3.14 Councils such as Torfaen have introduced automated call handling which has reduced costs and waiting times. Other recent developments such as the use of LiveChat has, for instance, seen Cornwall Council reduce overall contact centre costs by reducing unnecessary contact and improving customer satisfaction because there is no need to phone or wait in queues. Using LiveChat, one operative can communicate with up to six customers at one time.
- 3.15 In summary, these findings highlight the need to provide high quality phone and email services, improve our online information, expand the range of online services and develop the use of new methods to provide better customer experience and reduce costs.

4. The strategy

- 4.1 The main drivers of the strategy are:
- **Consolidate customer services** into a single service to establish consistent standards for customers.
 - **Provide a range of high quality customer services** through the web, phone, face-to-face, emails, text messaging, social media and developing the use of technology.
 - **Better use of resources and customer data** to improve efficiency and customer experience.
 - **Greater use of technology** to improve services, customer insight and working practices.
 - **Manage demand** by providing self-serve opportunities and increasing the range and effectiveness of online services to reduce unnecessary contact and waiting times for customers.

4.2 The strategy has four key aims:

- To improve customer experience.
- To achieve a fundamental shift in customer contact to digital self-service channels.
- To consolidate current customer contact.
- To use customer insight to improve services and achieve the other aims.

4.3 To achieve these aims we need to implement a number of key principles:

- We will operate as a single customer service organisation, not a number of separate customer services businesses.
- We will bring current customer contact resources under a single management structure.
- We will adopt the principle of *digital by default* and transfer, wherever possible, customer contact from face to face and telephone to digital channels.
- We will *make every contact count* to reduce or minimise demand and change resident behaviour.

4.4 We will need to:

- Invest in our telephony, digital and mobile working infrastructure.
- Reduce the number of customer contact posts over time to achieve savings.
- Develop a change plan with external and internal stakeholders.
- Ensure residents and protected groups are not disadvantaged by these changes.

5. Strategy scope and overview

5.1 Our Customer Contact Strategy focuses on our core customer channels: phone, email, face-to-face, online, out-going communications and developing contact via the likes of social media and text messaging.

5.2 We will offer customers flexibility in the way they can access services and interact with the council by providing the services they want.

5.3 Building on the growth of internet use to deliver more digital services will be at the heart of our strategy, adopting a '*Digital by Default*' approach.

5.4 This will help to drive down costs, maximise efficiency, give greater flexibility and access for customers and gather valuable customer insight to help us develop services tailored to our customers' needs.

- 5.5 We will make it easier for customers to contact us by phone and speak to trained staff who can resolve their requests.
- 5.6 We will also increase online contact through forms and develop the use of email, social media, mobile apps, LiveChat and text messaging to improve efficiency and customer service.
- 5.7 Our successful contact centre will be the centrepiece of our face-to-face channel, along with the potential for developing community-based facilities to help prevent unnecessary journeys and queuing times for customers. Discussions are already under way to offer a broader range of services at the Council's network of community libraries, along with the consideration of creating community hubs either in existing council buildings or by bringing together services into a single community building to act as a one stop shop.
- 5.8 Our staff will be equipped with the skills and knowledge they need to deliver effective customer services.
- 5.9 We will focus on making every contact count by skilling front-line staff in their engagement with the public to encourage personal responsibility and wellbeing through consistent messages.
- 5.10 The strategy will be supported by a publicity and marketing campaign to encourage customers to use the most efficient channel.
- 5.11 Our digital inclusion project will be extended beyond the 2014/15 financial year and support from trained staff will help to provide customers with IT skills and access to PCs to use online services.

6. Outcomes

- 6.1 The strategy has key outcomes for our customers and the Council.
- 6.2 Customers will have:
 - Increased choice in the ways they contact the council.
 - Quicker and easier access to a range of services.
 - High quality customer services across all channels.
 - Support to use new contact methods.
 - Opportunities to provide feedback to help shape services.
- 6.3 The Council will have:
 - Customer services consolidated into a single service, providing strategic direction and better linkages across all channels.
 - Better use of technology and existing resources to increase efficiency and drive down costs.
 - Consistent standards and practices in meeting customer needs.

- A reduction in unnecessary customer contact and increased satisfaction.
- A better understanding of our customers enabling us to tailor and target services.

7. Channel shift marketing plan

7.1 The Council's new website will be launched in summer 2014, with the development of a wider range of online services by the autumn. This will be followed by a marketing campaign to publicise the new website and its range of services to maximise efficiencies and encourage customer use.

The campaign will include online and offline promotion, including:

- Advertising services on Facebook and Twitter.
- Posters in council venues.
- A local media campaign.
- Emails.
- Advertising on council vehicles.
- Advertising boards and bridge banners.

7.2 A comprehensive review of all printed material will be carried out to ensure the most prominent point of contact is always the website address.

7.3 Achieving behavioural change is complex and difficult to achieve. This will require the use of resources from across the council, including research, communications, web and marketing as part of a *Making Every Contact Count* initiative to help manage customer demand.

8. Implementation

8.1 The strategy will be rolled-out over three years, supported by a Customer Services Project Plan. The priorities for Year One will be:

- A new website based on user feedback and best practice.
- Start the incremental roll-out of online services and e-payments.
- Improvements to the contact centre including wifi access, a new e-zone and piloting self-service cash payment machines.
- Piloting automated call handling.
- Digital inclusion strategy and promotion of existing sessions.

8.2 As these above priorities are rolled-out their impact will be assessed prior to deciding the phasing of further actions in Years Two and Three.

9. Consultation and Engagement

- 9.1 It is vital that we consult our customers on the strategy and on-going developments. This will include Swansea Voices, children and young people, older people, the Council's equality groups and customers at our different contact points. This will form part of on-going consultation to ensure we continue to provide and develop services in line with customer expectations. A full Equalities Impact Assessment will be undertaken as set out in section 10 of this report to address these issues.
- 9.2 Customer feedback will form part of a new drive to improve customer insight and quarterly reports will be provided to Heads of Service to ensure they have the latest findings and emerging trends.
- 9.3 We will work closely with other councils and agencies to learn lessons and identify potential collaboration opportunities.

10. Equality and Engagement Implications

- 10.1 An initial EIA Screening has been undertaken as a result of which a full EIA Report will be completed for the overall project. This will lay out the issues to be considered to ensure that necessary existing and enhanced methods of access will be maintained or introduced to allow access to services by otherwise excluded communities or groups.
- 10.2 As individual sub-projects proceed, this overall EIA will provide a template to ensure a consistent approach. The overall EIA may be amended to incorporate any new aspects which emerge during a sub-project and these will be considered for inclusion overall and so against all sub-projects.
- 10.3 The strategy will need to be reviewed in the light of emerging changes to legislative or regulatory requirements in the areas of equalities and Welsh language.

11. Financial Implications

- 11.1 The Year One proposals set out above will be funded by existing budgets within Communications and Customer Engagement, Information and Business Change and Finance.
- 11.2 There is provision in the Information and Business Change budget for the planned upgrading of the telephone and voice recording systems during 2014/15.

11.3 Other initiatives including technology and infrastructure will require an 'invest to save' business case which will be developed during Years Two and Three of Customer Services Project.

12. Legal Implications

12.1 There are no specific legal implications associated with this report, however the strategy will have to accommodate and comply with our statutory publication obligations.

Background Papers: None.

Appendices: Appendix A: Customer Contact Strategy Action Plan.

Appendix A: Customer Contact Strategy Action Plan

- **Face to face contact**

We will make it easier for customers to resolve their inquiries at the first point of contact by supporting customers to use online services, reducing queues and providing better access to a range of services.

<p>Increase the range of on-line services to reduce the need to visit the contact centre and reduce queuing times.</p>	<ul style="list-style-type: none"> • Contact centre transactions will be prioritised to become online services to reduce the need for customer visits. • Appoint digital champions in service areas to support/train customers to use online services. • Work with service areas to roll-out online services.
<p>Reduce queuing times by improving online access and self-serve opportunities.</p>	<ul style="list-style-type: none"> • Create an E-zone in the Civic Centre for the public to access council and partner websites and provide help to carry out online transactions. • Provide wifi facilities so that customers can be taken out of the queue to transact via an iPad with staff support. • Consider self-serve ticketing for some services. • Trained contact centre staff will support customers in using online services. • Introduce cash machines so that customers can deposit cash/pay bills quickly, allowing customers to pay third-party bills which will also generate income for the council. • Review parking arrangements to reduce queues. • New arrangements to enable visitors turning up for meetings to avoid the queue – eg, self-serve check-in.
<p>Provide better access to a wider range of services.</p>	<ul style="list-style-type: none"> • Work with partners to share facilities and provide a one-stop advice centre. • Consider how other council venues can provide wider services/advice and access to free phone, PCs and video conferencing for customers. • Consider community and/or city centre contact centres.

- **Phone contact**

We will consolidate call centres into a federated structure and cluster trained staff to deal with a wide range of complex services.

We will reduce the amount of published numbers, trial automated call handling and use resources more efficiently.

<p>Further consolidate call centres and make it easier for customers to speak to trained staff for complex and personal issues.</p>	<ul style="list-style-type: none"> • Establish a new call centre federated model to manage complex services (social services, finance & benefits) and those services that have similarities and can be clustered (buildings & environment). • Introduce a single management structure and local supervision for federated call centre model. • Internal call handling for managers and back-office staff to be provided by call centres.
<p>Improve call handling and use resources more efficiently</p>	<ul style="list-style-type: none"> • Procure a new voice recording system. • Pilot an automated call-handling system in benefits, business rates and council tax with the potential to roll-out across other services. • Establish consistent practices and call reporting and monitoring across all call centres. • Cross-train staff in call centres to work across disciplines and redirect staff to manage peaks. • Provide clear and consistent operating and working practices – eg, opening times and out-of-hours.
<p>Reduce the number of calls to operational and back-office staff.</p>	<ul style="list-style-type: none"> • Rationalise the amount of published telephone numbers to make it easier and more efficient for customers and staff. • Transfer high volume calls to call centres to improve efficiencies and free-up operational staff. • Provide recorded messages and improved online information for regular updates – eg, waste collection, pitches etc. • All customer contact to promote online information to reduce unnecessary contact.

- **Digital**

We will implement a new website content management system focused on customers and providing a wider range of online services and payments. We will encourage and support customers to use online services and develop new digital services to provide easier access and improve efficiency.

<p>Redesign and launch Swansea.gov.uk</p>	<ul style="list-style-type: none"> • Task-orientated site design. • Based around the user. • Improve search functionality. • Existing online resources replicated on the new site. • Additional reporting services. • Rationalise stand-alone websites. • Work with new commercial manager to identify new income streams.
<p>Support customers to use online services.</p>	<ul style="list-style-type: none"> • A digital inclusion plan aimed at key groups including the economic inactive and older people. • Contact centre staff to identify and support appropriate customers. • Marketing plan to promote online services.
<p>Roll-out new online services and payments.</p>	<ul style="list-style-type: none"> • Review online payments & consider alternative software systems. • Prioritise new online services by income and efficiency saving. • Integrate forms with online payments. • Integrate forms with back office systems. • Develop online mapping with integrated fault reporting.
<p>Redesign Staffnet to improve efficiency and make it easier to access information.</p>	<ul style="list-style-type: none"> • Replace current platform with a modern intranet system. • Make Staffnet task-orientated. • Have clear themes – eg, group all HR tasks and info together. • Improve search function. • Replace static monitoring systems such as spreadsheets and access databases with online systems. • Promote the use of knowledge bases within call centres.
<p>Integrate social media and LiveChat into customer services to improve efficiency and access.</p>	<ul style="list-style-type: none"> • Work with call centre staff to roll-out customer services support via social media. • Consider implementing a chat function with scripts online so that call centre staff handle up to six users at once. • Consider the use of Skype or other VOIP service to handle supported browsing. • Provide electronic progress updates to customers who request services.

- **Out-going contact**

We will reduce the amount of post and inefficient handling and develop a range of modern contact methods to save time and money.

Streamline processes and rationalise the amount of postal correspondence.	<ul style="list-style-type: none"> • DesignPrint to provide cost-effective “cradle to grave”– design, print, insertion and postage service. • Consider a corporate document management system to scan all incoming post to reduce the time taken to process customer requests.
Increase the use of email to contact customers.	<ul style="list-style-type: none"> • Move towards email by default, where possible. • Encourage customers to contact us by email and online forms to automatically code and filter requests to reduce back-office work. • Consider solutions to improve monitoring and quality.
Use cost-effective methods to contact large volume recipients.	<ul style="list-style-type: none"> • Consolidate postal services to ensure mail discounts are maximised. • Use Mailchimp to send bulk emails. • Review text messaging contracts and needs across the Council with the aim of consolidating into a single solution.

- **Customer Insight**

We will capture and analyse customer information and contacts more effectively so that we have a better understanding of customer needs, preferences and trends. This data will be used to develop and target services.

Improved analysis of customer data and trends to inform service development.	<ul style="list-style-type: none"> • Consider the procurement of customer database/CRM solution. • Customer insight updates to be provided to Heads of Service along with recommendations for improvement. • Mystery shopper exercises in customer contacts areas and provide feedback to improve. • Appoint service improvement officers to promote customer service, channel shift and implement changes in service areas.
Customers to help shape services.	<ul style="list-style-type: none"> • Complaints and access issues to be monitored and addressed with departments. • Swansea Voices to provide feedback on key customer issues. • Regular customer surveys/consultation to help shape services.

	<ul style="list-style-type: none"> • Develop customer forums to improve feedback and comments.
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- **Technology**

We will maximise the use of existing software to improve telephone services, expand online payment services and procure new systems to provide a single view of our customers.

Improve the use of the e-payments system.	<ul style="list-style-type: none"> • Commission Civica to carry out a health check to ensure we maximise existing modules. • Designate a group of officers to manage Civica issues and support cashiers in rolling-out e-payments across the council. • The web team to identify and encourage services to offer e-payments. • Encourage customers to use direct debit and apply full cost recovery for using credit cards.
Improve telephone functionality.	<ul style="list-style-type: none"> • Procure a modern telephone system for the main civic buildings. • Review existing contracts in other buildings to consolidate contracts and maximise savings. • Procure a new corporate voice recording system. • Maximise our telephony management system to respond to peaks. • Team leaders to receive training to improve performance management.
Improve the capture and use of customer data and contacts.	<ul style="list-style-type: none"> • Consider the procurement of customer database/CRM solution or systems integrator. • Develop a Tell Us Once facility for births and customer changes. • Research and Information to provide regular analysis on customer insight.
Identity assurance (potentially from Welsh Government)	<ul style="list-style-type: none"> • Scope methods of identifying users to verify their details to reduce crime including fraud. • Use verification to benefit the council, eg to cut fraud. • Use verification to check user info behind the scenes with third parties, saving a face to face visit.
Consider a customer relationship management system and integrator systems.	<ul style="list-style-type: none"> • Provide a system to handle appointment booking and link with payments. • Consider system to link to existing back office systems –possibly instead of customer relationship management system to save on annual costs.