



Report to Finance & Resources Select Committee

Date:	14 October 2021
Title:	Customer First framework and Customer Service Centre performance
Relevant councillor(s):	Cllr John Chilver and Cllr Tim Butcher
Author and/or contact officer:	Sarah Murphy-Brookman
Ward(s) affected:	None specific

Recommendations:

To note: the proposed Customer First Vision and Promises and Behaviours as a whole Council approach to the delivery of our corporate plan and Customer Experience ambition.

To note: the current Customer Service Centre Performance, the operating context that impacts current performance levels and the improvements in hand.

1. Executive summary

- 1.1 At present the Council takes a service-based approach to customer service and the customer experience.
- 1.2 The Customer Service Centre (CSC) is our Council front door for our customers - residents, businesses, service users and Members. The service brings together the legacy council teams and over the past year it has been central to supporting our Covid response.
- 1.3 Promoting a positive customer experience is a high priority for Members and the Unitary Council provides an opportunity to develop and deliver a consistent whole Council 'Customer First' approach. **Part 1 of the report** sets out the proposed **Customer First framework** which seeks to raise standards, improve the customer experience, and ensure consistency.
- 1.4 **Part 2 of this report** sets out the **current CSC performance**, the challenges and the improvement activities that are in hand. Recognising that Customer is a key

Member priority the Better Buckinghamshire CSC service review has been accelerated to bring legacy teams and the CSC technology together as quickly as possible

- 1.5 Although the Finance and Resources Portfolio is the lead for Customer this is a cross Council issue and therefore requires engagement from all Services and Portfolios.

2. Content of report

Part 1 - Customer First

- 2.1 The Corporate Plan sets out a commitment for the Council to be Customer Focused. To achieve this we have developed a vision for a 'Customer First' culture that is prioritised through the entire organisation and which every employee values, owns and exemplifies.

- 2.2 Within this Customer First framework we have set out the great customer experience that any customer of the Council should receive.

- 2.3 We have set out three promises to our customers about the sort of experience they should expect:

'Easy for you to get in touch with us, easy to get what you need

Helpful and that we aim to get things right first time

Fair & Honest in our approach so that we're clear about what we can and can't offer, and the reasons why'

- 2.4 Within this Customer First framework we have described the behaviours that we expect from our staff and what we expect from our customers.
- 2.5 We have identified four themes which underpin our Customer First framework and which guide all our Customer First improvement work: Policy, Process, People and Performance.
- 2.6 And we have set out the practical actions that we are going to take to make 'Customer First' real and to ensure we make meaningful improvements.
- 2.7 Customer First is designed to align with the Better Buckinghamshire Programme which has Customer Focused as one of its Design Principles. This means that every

Service Review is tested against the Customer Focused design principle to ensure that Customer is built into Services.

Customer First - Vision, Promises and Behaviours (Appendix 1):

- 2.8 Our proposed Customer First Vision and Promises set out clearly what any customer of Buckinghamshire Council can expect from us. It is written in a style that is intended to be accessible and easily understood and that tells our staff and customers what the customer experience should 'look and feel' like.
- 2.9 Supporting this we have described the behaviours that we expect from our staff and those we request of our customers.
- 2.10 Once agreed we will publish this on our website.
- 2.11 To support this we will roll out a comprehensive training programme that has three levels of training:

<p>Level 1 – Universal customer first training</p>	<ul style="list-style-type: none"> • For all staff / new starters • To cover customer handling skills and customer basics – replying promptly; using holding replies; language and tone • Delivered internally using eLearning live and recorded webinars from Customer Experience Team
<p>Level 2 – Customer Service front line staff</p>	<ul style="list-style-type: none"> • For staff delivering front-line services to customers as a key part of their roles e.g. Customer Service Desk, CSC, Waste Services, Environmental Health, IT/HR Service Desk • More in-depth knowledge and understanding • Training may be delivered internally within service area and or with support of an external provider
<p>Level 3 – Advanced customer service advisors</p>	<ul style="list-style-type: none"> • This training is aimed at staff delivering complex or difficult messages to demanding customers. • Training to include being empathetic but also confident/ positive and clear in our messages so that customers understand our decisions and why • To support these staff it is proposed to also train a number of staff as Customer Care Coaches and Mediators. <p>Customer Care Coaches and Mediators will:</p> <ul style="list-style-type: none"> ○ Coach and give feedback to colleagues ○ Act as a customer advocate



	<ul style="list-style-type: none"> ○ Train internal exemplars to provide internal mediation to help conflict resolution ○ Challenge existing behaviours and processes to ensure a positive customer experience ○ Support internal mediation with external mediation support where necessary
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Customer First - Action Plan

2.12 To deliver 'Customer First' we have developed an Action Plan built around four Customer First themes:

- **Policy – a framework for Customer First**
- **Process – our approach to the way we provide services to our customers**
- **People – what we expect from our staff as customer exemplars**
- **Performance – how we will measure our progress**

2.13 Key Deliverables within the action Plan include:

Policy	<ul style="list-style-type: none"> • Our Customer First Vision and Promises to be agreed by our new Cabinet and published on our website • Cabinet and Select Committee reviews the progress of Customer First • We will ensure that our third-party suppliers have a Customer First approach and our procurement and contract management processes will test and enable this • We will have a Customer First Team who will support, monitor, embed and develop our Customer First framework
Process	<ul style="list-style-type: none"> • We will ensure that our Customer Service Centre has access to information and line of service systems so that they can answer queries as far as possible at the first point of contact • We will maximise 24/7 access to services through our digital programme • We will make sure that any customer can speak to us face to face and we will have dedicated sites to do this. • We will provide 'live updates' for customers on their transactions with the Council (e.g. planning applications, bus pass applications, queries regarding waste services etc) • We will create resident panels to test our service improvement and service design work



	<ul style="list-style-type: none"> The Better Buckinghamshire Programme tests each Service Design against the 'Customer Focused' design principle.
People	<ul style="list-style-type: none"> We will include Customer First as part of people processes including, recruitment, induction, performance management. We will create Customer First champions in each Team who will act as the customer advocate and will challenge the way we work to ensure that a positive customer experience remains at the heart of service delivery We will celebrate our Customer First stories to showcase great Customer Service. Our staff awards will include 'Customer Hero' award category We will put mandatory Customer First Training in place that focuses on behaviours and provides our staff with the skills to manage challenging and difficult customer conversations
Performance	<ul style="list-style-type: none"> Each Service will report against a corporate Customer First performance dashboard which include Complaints, Compliments and Customer feedback The CSC Customer performance dashboard will include measures of the customer experience We will survey resident satisfaction with services that the Council provides and we will include this in our corporate performance dashboards We will develop a customer insight dataset from a range of sources – customers; performance data; Community Boards; Resident Panels; satisfaction survey

2.14 We know that the Better Buckinghamshire programme is key to the delivery of our Customer ambition and as each Service progresses through the Better Buckinghamshire service review process the proposed service designs are tested against the Customer Focused Design Principle:

Better Buckinghamshire Design Principle - Customer Focused:

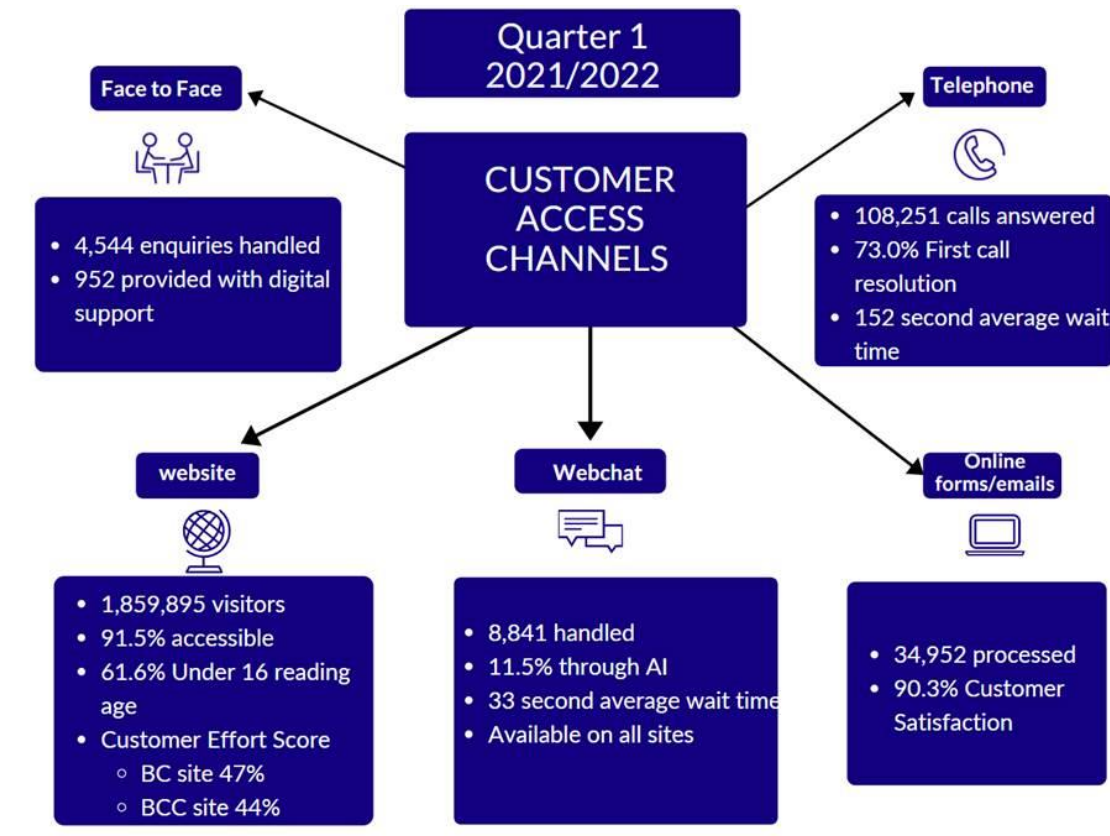
Services and processes will be co-designed with employees, customers, service users and communities around their needs, making the best use of existing and emerging technology as appropriate. We will place our customers at the heart of what we do. We will provide excellent digital channels whilst also ensuring that telephone and face to face access is provided for our most vulnerable residents and those who are digitally excluded.



Part 2 - Customer Service Centre

Introduction

2.15 The Customer Service Centre is the front door for the Council, the consolidated volumes across our access channels for Quarter 1 (2021 / 2022) are set out below.



Footnotes:

Accessibility measures how we make our websites usable by as many people as possible. This covers both people with disabilities, plus accessibility using mobile devices and those with slow network connections.

Average reading age – this is the reading age required to use our website (UK average is 9 years)

Customer Effort Score is a % of visitors who rated a page on the website as useful.

AI – Artificial Intelligence – an example is Amazon’s Alexa

2.16 The operating model of the CSC is to achieve a personalised service which maximises first contact resolution, minimises the referral of calls into service teams and thus helps reduce the overall costs of the Council. This is achieved through a mixture of contact us forms for specific and general enquiries; bespoke digital online forms such as reporting a missed bin; webchats; face to face enquiries at our Council Access Points and telephone calls.

2.17 This personalised service means that telephone calls in particular can take quite a number of minutes to complete but the end result is a better customer experience as customers for the majority of transactions should only need to contact the Council once. This approach seeks to maximise First Call Resolution (FCR).

Customer Performance Data

2.18 The current performance indicators for the six months April – September 2021 are set out below:

Indicator	Target	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21
Calls offered	-	41,568	43,089	48,084	42,757	38,098	41,978
Calls answered	-	32,960	36,272	39,013	35,756	32,830	37,887
% calls answered	90%	82.40%	84.20%	81.13%	83.62%	86.17%	90.25%
% calls abandoned after 100 secs	10%	13.50%	9.80%	18.51%	16.18%	12.47%	9.09%
First call resolution	51%	54.20%	70.00%	80.00%	78.00%	74.80%	77.80%
Average call wait time	180 secs	189	304	328	323	313	222
Number of webchats	-	3,385	2,357	3,099	3,358	2,899	2,975
Average chat wait time	100 secs	28	28	27	33	38.5	28
Online forms/email	-	11,161	12,249	11,542	10,632	8,477	7,373
Council Access visits	-	1,110	1,682	1,752	1,818	2,099	2,068

2.19 The May – August 2021 performance has been disappointing - in particular the % of calls answered; calls abandoned and wait times all of which are outside their performance target. First Call Resolution has remained significantly above the target.

2.20 Overall there has been a 10% increase in calls into the CSC over the period April - August 2021 compared with same period last year and a corresponding 6% reduction in calls answered. This increase in demand has been driven by two service areas – Waste and Council Tax. The impact of the Southern Waste HGV driver shortages have given rise to high numbers of calls primarily about missed bins. As an example there were an additional 2,000 calls in June 2021 compared with May 2021 on Southern Waste alone.

2.21 In the case of Council Tax during the first wave of Covid we paused all Council Tax debt collection activity and only restarted this in September 2020. This year we have

been actively managing debt collection in line with our normal collection processes. However the backlog in the Court system, plus the restricted number of Court dates has meant that reminder letters and summons must be issued en masse. Although we spread the reminder letters for each Revs and Bens area across the month as far as we can, summons letters in particular need to be issued promptly. With up to a thousand summons letters at a time this inevitably creates significant demand into the CSC and we know that residents will wait in a queue to talk to an Agent about their particular circumstances.

- 2.22 Performance has started to improve from August 2021, with an increased number of calls answered, less abandoned calls and a shorter average waiting time compared to July 2021. In September, performance was within target for both calls answered (90%) and calls abandoned (9%) for the first time since April 2021.
- 2.23 The recent improvement in performance is due mainly to the various improvement actions that are outlined from section 2.26, especially the extension to the use of the Injixo workforce management tool. This tool uses historic call data to better plan agent schedules and ensure that spikes in demand can be managed. From September, the use of the tool was extended to include legacy Wycombe and Aylesbury call handlers.
- 2.24 Going forward the new Revenue and Benefits system will provide a far better Customer Experience as Residents will be able to check on their Council Tax payments far more easily, make changes such as change of address and view account balances and this should reduce the number of calls.
- 2.25 The insource of the Wycombe CSC has also impacted performance data – this is no longer operating as a ‘switchboard’ style CSC which maximised call answering and minimised First Call resolution. Instead the Wycombe team now provides a full CSC service which prioritises first contact resolution of calls.

CSC Improvement Activity

- 2.26 To better manage the rising customer demand received to the CSC, a number of improvement actions have been identified and are in the process of being implemented. These actions recognise that our Customer journeys fall into three ‘phases’ which require different targeted improvement activity.



2.27

Phase		
Customer - CSC	CSC – Line of Business interface	Customer - Line of Business Service
Aim to maximise First call resolution	CSC either sourcing additional information or passing the enquiry through to the Service	Only those enquiries which require specialist skill or knowledge should pass through

2.28 *CSC – Actions*

- Call waiting message including alternative methods to contact us
- Position in queue message
- Promote the single CSC contact number to reduce the use of legacy telephone numbers
- New online planning enquiry form to direct customers to the appropriate web pages – in final test
- New automated forms e.g. assisted waste pickups/ clinical waste that allows residents to select dates. This means that there is no manual intervention required by the line of service team.
- Injixo Workforce management tool used across all CSA staff
- We have implemented the facility for customer feedback/satisfaction on the Buckinghamshire Council web site to capture feedback from customers and we are using this information to take the appropriate action with either the service areas or the web team to improve the online journey with the aim of reducing calls.
- We are focussing on increasing web chats as a channel of choice. Our Advisors can handle up to 3 web chats at a time which makes it a very efficient customer channel.

2.29 *Interface Actions*

- Improving information that the Customer Service Agents can access from Line of Business Service systems to answer enquiries at first point of contact

2.30 *Line of Business Service - Actions*

- CSC representatives attend Service Improvement Boards and Service Task and Finish Groups. As examples tactical improvements for Southern Waste have included:
 - Placing a list of missed roads onto the website each night to inform residents when their bin will be collected
 - The CSC meets formally twice weekly with the Service Waste team to review performance and to identify quick wins or improvements whilst the contract is managed back to its contractual performance levels
- Data provided to Services about customer progress chasing enquiries so that these are prioritised and reduced.
- Provision of CSC stats to help services improve performance and understand where demand failure occurs

Customer Service Centre – Service Review

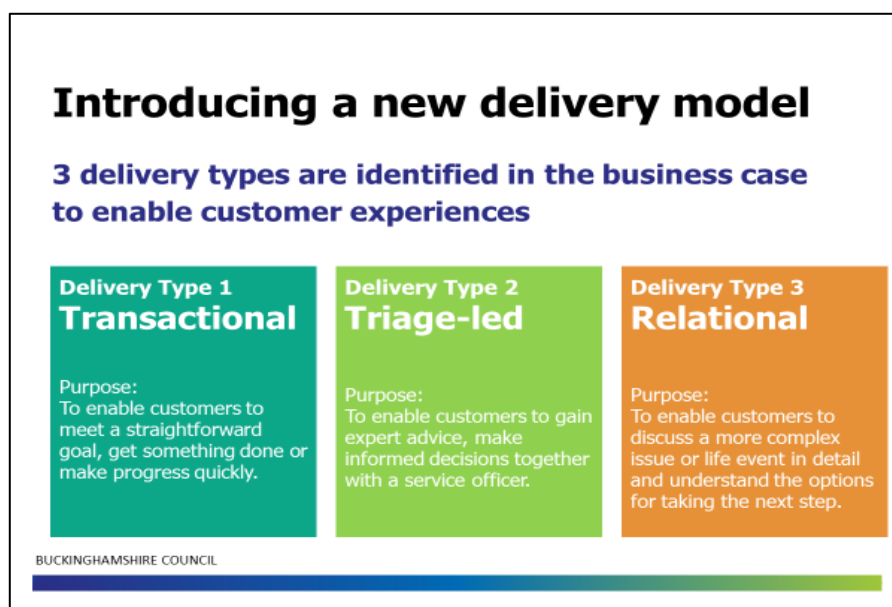
2.31 Recognising the importance of Customers the Customer Service Centre Review has been accelerated and although it is yet to complete the key findings to date are:

- contact centre tools that aren't consistently integrated with business systems, making it difficult for customer service agents (CSAs) to handle customer enquiries at the first point of contact;
- customer access channels that aren't sufficiently integrated, meaning that customers have different experiences when they contact the Council, and that the Council doesn't have a 360-degree view of customers and their experiences across channels and through the end-to-end journey;
- a delivery model that isn't resilient, cost effective nor easily scalable to enable the future customer experience and support the delivery of customer services that truly meet resident needs;
- a suite of performance metrics that, while comprehensive, are not clearly aligned with the CSC's purpose and the outcomes it wants to achieve.
- A current people structure following the 'bolt together' of the five legacy customer contact centres that is not fit for purpose and has different approaches and styles to managing customer services, and lack a clear and consistent vision for the future.

2.32 These findings plus detailed mapping from six of the Council's high demand services has allowed us to describe a new delivery model for the CSC - Table below. This has

been designed around the 3 common customer journeys and customer service needs and are designed to be scalable so that as Services progress through the Better Buckinghamshire programme the appropriate Customer delivery model can be embedded within the relevant Service.

2.33



2.34 The delivery model design recognises that Transactional services e.g. reporting a missed bin, lend themselves to digital self-serve whereas Relational services require a personalised service. However, for all three delivery types a customer can choose to have an assisted service either via telephony or at a Council Access Point.

CSC Staffing

2.35 The CSC has a team of 80 FTE call handlers. However after annual leave, other absences, offline activities and training this equates to 56 FTE who are active each day, of which 42 FTE are on the phones, with 14 FTE supporting other channels including webchats, form processing, emails and Face to Face.

2.36 The CSC is also consolidating its team into a single service and a single Head of Service was appointed in June 2021.

2.37 To manage peaks in workload a number of steps have been put in place including Contact us Forms being responded to out of main call hours; managers and supervisors answering calls and bridging resource provided through assistance from those line of service teams with high call volumes.

2.38 This bridging resource model has contributed to the CSC performance improvements and will be deployed as and when service spikes occur or service changes are planned which are expected to generate higher call volumes.

CSC Technology

2.39 *Telephony* – we have now completed consolidation onto a single telephony platform and this enables us to quickly and efficiently transfer resource to call lines where there are increased call volumes. The single telephony platform also offers more resilience and helps stabilise the service by reducing call abandonment and wait times for customers

2.40 *Workforce Management* - we have now deployed a single workforce management software – Injixo - across all our staff to give a holistic picture and allow capacity planning for peaks in contact. The software looks at historic 8-week data and produces a forecast for staff breaks, lunches and offline activities based on anticipated volumes. Seasonal peaks are also forecasted against previous yearly trends.

2.1 *Performance Data* - As part of the CSC Service Review the teams' reporting and operational practices are also being harmonised. Currently the teams are on different systems with different performance recording methodologies which does not make the comparison of performance data straightforward.

2.2 *Webchat* – We currently have two webchat solutions in place. Work is starting to harmonise webchat providers with an ambition to increase the use of automated responses to common queries

2.3 *Customer Relationship Management (CRM) System* - we currently have three Customer Relationship Management solutions in place in our customer services teams. This also impacts the Councils' direction on Customer Accounts – whether we have a solution where the customer can access all their records with one, single sign on through the same system, or whether they sign into other applications (for example, the library customer account) for more specialist interactions.

2.4 Going forward the proposal is to take a Master Data Management (MDM) approach. This is an application that reads data from a variety of sources (back office systems, existing Line of business CRMs and forms) and then presents a complete data picture back to a customer service agent or a customer themselves.



- 2.5 Work is in progress to define a comprehensive set of requirements for both the CSC CRM system and Customer Accounts; plus the interface with Line of Business CRMs all using a Master Data Management approach to make sure we get the right solution that supports our principles for customer services.
- 2.6 *FixMyStreet* – this is a digital access channel provided by a third party – My Society - and the Council Digital team have now recruited a product owner to review and improve all customer message and signposting.

CSC Challenges

- 2.7 *Call volumes* – The number of calls received in the CSC has increase by 10%. We are using our CSC data to work with services so that they understand how we can reduce demand failure.
- 2.8 *Call wait times* – We know that at some points the call wait times have been unacceptably high and the reasons and some of the actions and improvements are set out above. We also have a particular issue with assisted telephone payment process – this is where a customer wishes to pay over the telephone and is transferred to the payment line when the advisor has setup the payment but it then requires our advisor to collect a completion code and so they must stay on the call until the transaction has completed. This does impact upon the call length by approx. 2 mins and increases waiting time where there is an assisted payment. We are working with the supplier to identify a solution to this.
- 2.9 *Access to Line of Service Business Systems.* To maximise First Contact resolution, we need to provide our Agents with access to back office systems.
- 2.10 *Customer correspondence.* Agents do not always have sight of correspondence between the Council and the Customer, GDPR requirements notwithstanding, if Agents had this access this would make the Agent better placed to assist. This will be explored as part of the Master Data Management approach described below.
- 2.11 These challenges emphasise the need for a Council Customer First approach so that every Officer across the entire Council prioritises the Customer Experience.

CSC Improvements

- 2.12 The key to driving a better customer experience is to have business as usual level of contacts so that agents can answer calls within target wait times; to reduce progress

chasing calls by either the CSC being able to answer the enquiry and/or to prioritise the relevant service to address customer contact enquiry resolution.

- 2.13 *CSC performance reporting.* As the CSC consolidates its technology estate this provides the opportunity to report consistent single performance figures. The analysis of the consolidated data means that we are then able to understand for each access channel and service line where we have spikes in contacts and what the underlying reasons are so that we can address failure demand.
- 2.14 *Access Channels and Ease of Use.* We have a customer improvement team who look at opportunities to improve the customer experience across all of our access channels, whether it is wording; signposting or creation of e-forms. We have made the signposting more visible for our alternative access channels whether it is webchat; contact us forms and automated enquiry resolution through AI - which is particularly useful out of hours – as alternative to telephony.
- 2.15 *Task and Finish Methodology.* The CSC has through its experience with Southern Waste team developed a joint methodology of performance dashboards and deep dives to address customer and service performance issues.
- 2.16 Whilst it has been very challenging with regard to Waste this in-depth service engagement model has proved very successful and has been rolled across into Home to School Transport and Adult Social Care. The CSC is also embedded into Service Reviews and Improvement Boards so that the Customer Experience is prioritised.
- 2.17 *Access to Line of Service Systems.* Currently Services through the Better Buckinghamshire programme are consolidating their systems. As an example Revs & Bens are consolidating onto a single system - which will start in December 2021 with full go live in April 2022. In most cases it is not cost efficient to either procure licences or train Agents on these multiple systems. The current approach for high volume enquiries e.g. Southern Waste is to provide a daily ‘scrape’ of data so that Agents have recent information. Going forward the proposal is to take a Master Data Management approach.
- 2.18 *Customer Service Agent Training.* Our Customer Service Centre Agents have shown good skills taking on new additional work, often at short notice, including Local Contact Tracing; Helping Hands; general Covid enquiry line and the vaccination booking line.
- 2.19 We are now rolling out a consistent training plan that will include all Advisors entering data whilst on the phone and all team members having a reduction in average handle time as a target in their C4P to make call taking as efficient as possible. We are also upskilling advisors who historically may only have taken one

call type to be trained across different call types to add better resilience and improve answer rates and wait times.

CSC Improvements Road Map

2.20 Whilst the CSC Better Buckinghamshire review is not yet complete the expected implementation timeline for the CSC recommendations are as follows:

- ***Short term – 2021/22***

- Insource Wycombe Capita CSC – delivered in June 2021
- Interim single telephony solution in place, final telephony contract award and implemented - October 2021.
- Agree Master Data Management and CRM strategy and commence procurement – Autumn 2021
- Webchat consolidation and automation – in progress
- Customer First Framework agreed – September 2021

- ***Medium term – 2022/23***

- Implement MDM and CRM strategy
- Continue to roll out the new customer delivery model
- CSC Continuous Improvement activity

2.21 Taken together the CSC consolidation and Service Review plus the proposed Customer First proposal are key to this whole Council approach.

3. Other options considered

3.1 The alternate option would be to continue with a fragmented approach to Customer however this would neither deliver our commitments with the Corporate Plan nor would it deliver the Customer experience that our Customers should reasonably expect.



4. Legal and financial implications

4.1 Budget for the Customer First Team and the customer training has been identified and is fully funded and all costs can be contained within Resources Directorate budget. There are no other direct legal or financial implications.

5. Corporate implications

- Property - none
- HR - none
- Climate change -none
- Sustainability - none
- Equality – no EQIA required
- Data – no DPIA required
- Value for money – this will deliver cost avoidance as customers will be able to do more at the first point of contact and will have a good customer experience and so be less likely to complain

6. Local councillors & community boards consultation & views

6.1 Not applicable.

7. Background papers

7.1 Corporate Plan [Corporate plan | Buckinghamshire Council](#)

7.2 Current Customer Service Standards [Customer service standards | Buckinghamshire Council](#)

'Customer First' - our vision:

We're here to make people's lives better. That includes delivering the kind of customer service that we'd want for ourselves and our families and friends: **easy, helpful, fair & honest.**

Customer First - our Promises:

Easy- we will:

- Provide a number of ways to get in touch- in person, on the telephone and on line.
- Join things up for you, both inside the council and with our local partners.
- Help you if you need particular assistance- for example because of a disability or health condition.

Helpful- we will:

- Ensure you feel confident that we've listened to you, understood your needs and will take action.
- Aim to get it right for you first time.
- Always look for ways to improve how we do things.
- Seek to deal with things quickly and telling you when there is a delay.

Fair & Honest- we will:

- Set clear expectations about our policies, processes and standards, telling you what we can and can't offer and why.
- Treat you as we would like to be treated.
- Say sorry if we get something wrong and learn from our mistakes.
- Clearly explain our actions to you, so that you understand our decisions.
- Keep your information and data secure, in compliance with GDPR.



'Customer First' Behaviours

We know that behaviours matter and that even when things have gone wrong a great customer experience provides the opportunity to rebuild trust and confidence in the Council. Our customers also have an important role to play so that we can get everything back on track.

Our staff will:

- tell you their name and the department they work in, so you know who you're dealing with
- deal with things quickly and tell you when there's a delay
- apologise when we get things wrong
- treat you with respect
- listen to your feedback

We request that our Customers:

- be polite and are prepared to listen
- don't use abusive language or behaviour when dealing with our staff or contractors
- provide accurate and honest information so that we can deal with your request as promptly as possible
- let us know in good time if you need to cancel or rearrange an appointment
- tell us if your circumstances or contact details change
- tell us if you have been having problems so that we can work together to resolve them