



## Report to Finance & Resources Select Committee

**Date:**

**Reference number:** n/a

**Title:** **Customer First and CSC Performance Update and Quarterly Dashboard**

**Cabinet Member(s):** Cllr John Chilver (Cabinet Member, Resources), Cllr Tim Butcher (Deputy Cabinet Member, Resources)

**Contact officer:** **Lloyd Jeffries, Service Director (Business Operations)**

**Ward(s) affected:** None specific

**Recommendations:**

- To note the Customer Service performance data for the 4 months through to October 2022 and the interventions put in place to stabilise and improve performance.
- To note the output of the review completed by consultants, IMPOWER, particularly in relation to building a more resilient Customer Services.
- To note the success of call shadowing during National Customer Service Week and the recommendation to build call shadowing into staff inductions and ongoing training.

**Reason for decision:** n/a

## **1. Executive summary**

- 1.1. The last two years have changed the landscape for customer engagement in Buckinghamshire; with the transition to a unitary authority, a pandemic and numerous causes of spikes in customer demand taking place alongside significant internal reorganisation and consolidation of technology and systems.
- 1.2. Consequently, the Customer Service Centre (CSC) has experienced a sustained period of higher-than-normal levels of customer contact, driven by Line of Business activity arising from the continuing complexities and harmonisation of system implementation, contractor and supplier performance issues and recruitment challenges. This is driving performance challenges and a need to reflect on how a resilient and effective Customer Service model can be achieved in the future.
- 1.3. This report covers:
  - Current CSC performance
  - A review of our Customer First Activity over the last 12 months and the forward plan of actions
  - A review of Customer Service Week
  - Overview of the IMPOWER review covering CSC capacity, demand, rightsizing, and CSC resilience

## **2. Content of report**

### **Current CSC performance**

- 2.1 During the last 12 months, the Customer Service Centre (CSC) has experienced a sustained period of higher-than-normal levels of customer contact, driven by line of business activity and changes which has resulted in fluctuating CSC performance against key indicators, such as call abandonments and wait times.
- 2.2 There were some pressures that could not be anticipated – for example, the fuel rebate paid via Council Tax, and the major disruption and dissatisfaction residents felt about Southern Waste performance after the rounds were re-configured.



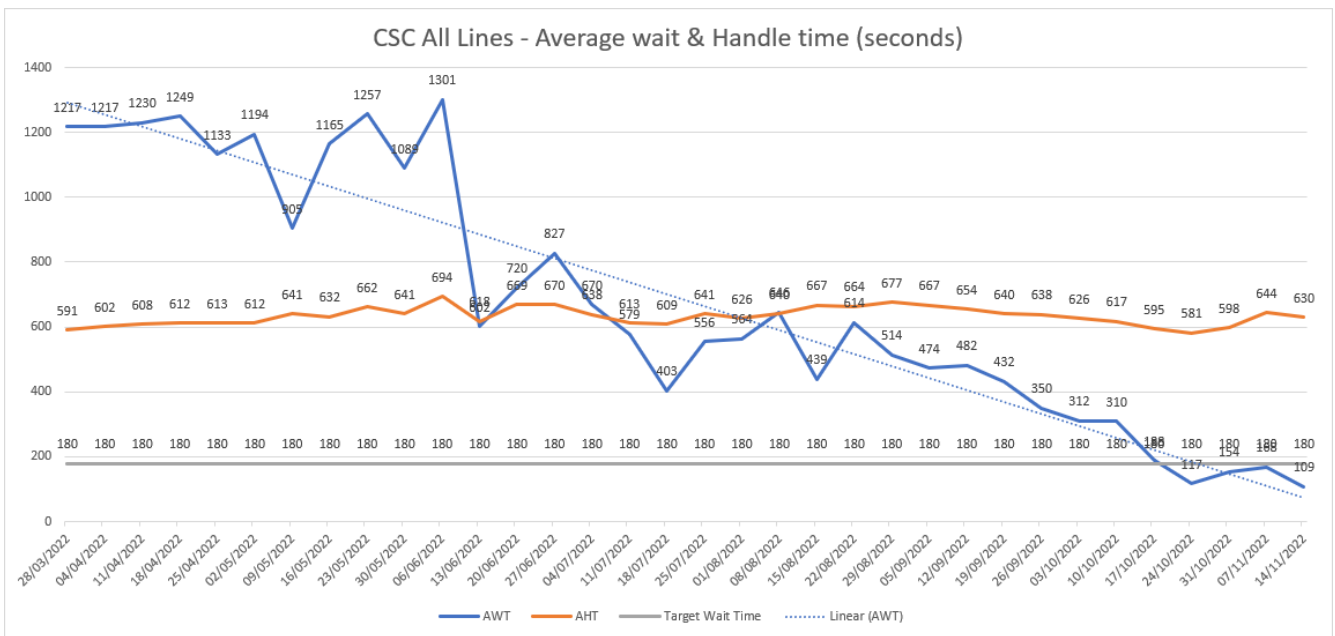
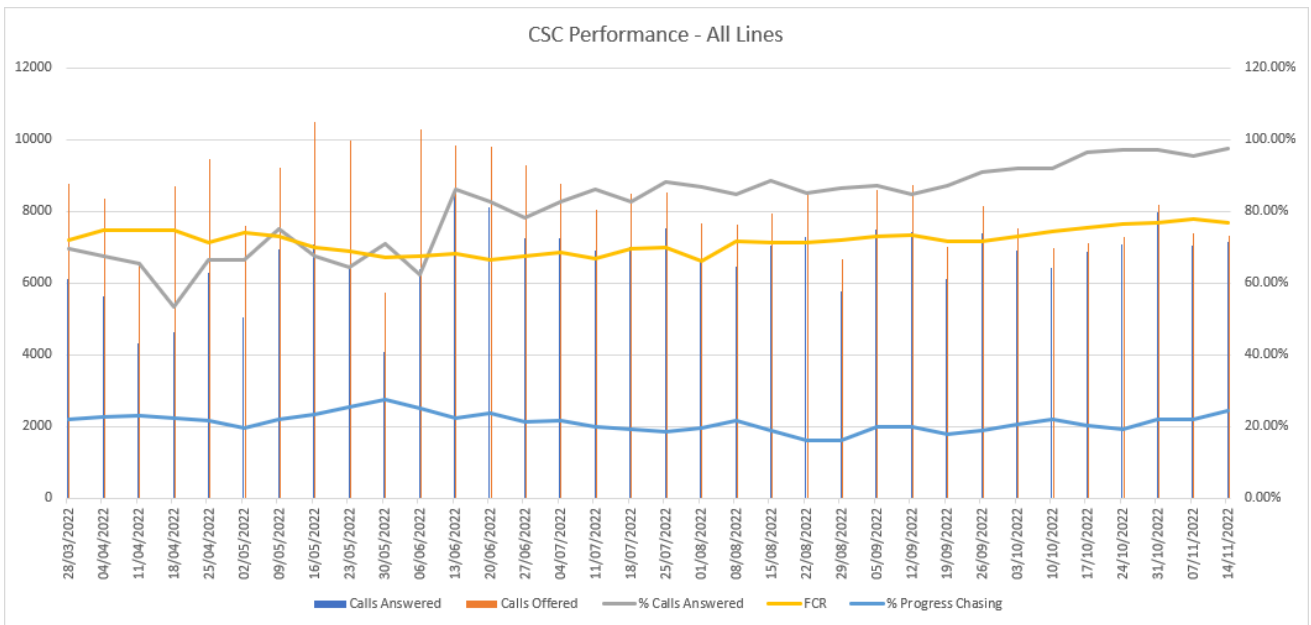
2.3 The current CSC performance indicators are set out in the table below:

Indicator	Target	21/22	Jul-22	Aug-22	Sep-22	Oct-22	Nov 22 (to 21st inc)
Calls offered	-	476,004	40,046	35,307	35,554	33,592	23100
Calls answered	-	#####	30,276	30,476	31,203	29,187	22374
% Calls answered	90%	85.25%	75.60%	86.31%	87.80%	94.48%	96.85%
% Calls abandoned	10%	11.74%	12.30%	11.40%	11.90%	4.71%	5.32%
Average call wait time	180 seconds	326	431	426	434	242	134
First call resolution	51%	71.41%	68.60%	70.40%	72.40%	75.30%	77.10%

2.4 Performance has steadily improved since the summer months in all metrics. Customer Services faced significant challenges in the early part of year, and the interventions put in place have made a substantial difference to our ability to support our residents through telephony. What follows are some examples of those interventions, and the impact they have had on the customer experience.

- 2.4.1 **Injixo Management System:** all members of the customer service team are now on this workforce management tool, which means we can re-allocate resource during the day based on demands and monitor behaviours in a consistent manner.
- 2.4.2 **Senior Management and Back Office Teams** are now helping resource the telephone lines when significant spikes in volumes occur, to flatten demand.
- 2.4.3 **IVR** (interactive voice response) has been redeveloped to provide better signposting for our residents and managing expectation, signposting them to the digital platform where appropriate. These have been particularly effective with Revenues and Benefits, particularly around the Fuel Rebate payments made available by Central Government paid via the Council Tax system.
- 2.4.4 **Increased scrutiny** of the data captured when a call cannot be transferred means a better understanding of whether the call was not answered, or where the service refused to answer. This heightened scrutiny has resulted in a significant reduction in ‘refusals’ by service areas.
- 2.4.5 **This scrutiny** has been extended to the data regarding progress chasing, to get an understanding why the resident feels ignored and has a compulsion to chase a request. This information is shared with Customer Service Managers to discuss at account management meetings, so service areas can address customer expectation around service level agreements and status updates to prevent residents from feeling forgotten and reaching for the telephone. Monthly Service Director performance packs are now being produced to share the information.

- 2.4.6 **Customer Services Staff** have shown commitment to working additional hours and have been remunerated for their efforts via overtime or time off in lieu. This has been particularly effective in dealing with 'contact us forms' which can be dealt with outside of core hours.
- 2.4.7 Introduction of a **call back** facility on our key service lines so that customers have the option to not wait on hold. Instead, the customer is called back when an agent is available.
- 2.4.8 **Targeted Recruitment of additional officers** into the Customer Service Centre has been effective. HR has supported Customer Services to introduce a series of assessment centres-style sessions to support recruitment at scale. These include "Try Before You Apply Sessions", where candidates listen to live customer calls and experience a day in the life of customer service agent. This mitigates against the risk of new starters being put off by the challenging environment when the beginning of their contract.
- 2.4.9 Introduction of **career-graded** customer services roles and apprenticeships as well as investing in our recruitment campaign and social media strategy to attract high quality candidates.
- 2.4.10 **Temporary staff** on-boarded to deal with known peak demand, in particularly to cope with additional pressures caused by the Southern Waste rounds re-organisation.
- 2.4.11 In addition, the Council is currently recruiting a **casual workforce** that will be made up of people looking for flexible working hours such as students, retired professionals, or volunteers. This bank of staff will be used for one-off pieces of work e.g., energy rebate calls or dealing with surge activity in a specific area, to support organisational resilience.
- 2.4.12 **Using Capita as an additional resource** to stand up 10 FTE trained revenues and benefits to cope with known additional demands following the single system implementation and 11 week shut down.
- 2.5 These interventions have helped us to see significant improvements in average wait times over the last 6 months, particularly in our high volume, transactional call lines such as Southern Waste or Revenues. This is demonstrated in the charts below, which shows how the average wait time across all telephone lines has gradually improved, from a peak of over 21 minutes in June 2022 to a current rate of just below 2 minutes (within targets). The percentage of calls answered has also gradually increased and is now above the 90% target.



2.6 We can see the impact of these changes not just through these metrics, but through the feedback we receive from residents on our social media channels. These positive changes, and further interventions, will help us to manage potential future disruptions, to keep this stability and to ensure we continue to give our residents the service they expect and deserve. In the last quarter, customer services received **37 official compliments**, with zero complaints for CSA performance.

2.7 Work to develop a **peripatetic workforce** is continuing to ensure that additional internal capacity can be drawn upon during times of very high customer demand. Customers services has recently piloted a **webchat trial**, whereby officers in services

outside of the CSC, are able to support demand through responding to webchats received via the website.

- 2.8 This option is easier for services to accommodate compared to taking customer calls - support can be time-boxed to parts of the day and as chats tend to be less hostile / confrontational than phone calls they don't require the same level of customer services skills to manage.
- 2.9 Chats can be held alongside ongoing BAU work (much like Teams messaging) and aren't as "real-time" as phone calls with a frustrated customers waiting for the right response immediately. There can be pre-defined responses to support staff and service-based chatters can have access to CSC Teams chat for asking questions, as well having access to a knowledge base, scripts, and frequently asked questions.
- 2.10 If a chat can't be resolved there and then, then they could book a call-back for customers (either CSA or service led) or even transfer to another officer to respond.
- 2.11 This model was successfully trialled in the Customer Improvement team, with additional capacity provided to support Council tax, Waste and Housing enquiries. We will extend this trial to Corporate Business Support staff and plan to roll out further to wider organisation in due course.
- 2.12 In October 2022, CMT agreed our new "**rising tide**" **resilience framework** – this was created in preparation for the launch of the single Revenues and Benefits system to ensure the CSC was ready to manage spikes in customer demand. Where call volumes start to breach the average wait time indicator, there is now tiered set of responses. The approved approach is now being rolled out to other key lines of services.

## **Customer First**

- 2.13 Within the Corporate Plan the Council clearly sets out its customer centric ambition which we describe as Customer First. The Customer First Strategy was agreed by Cabinet in September 2021, and the Customer First service standards are published on our website as three promises. To support this strategy, we have put in place a Customer First Board to ensure that there is a single corporate approach to deliver this customer experience ambition.
- 2.14 The Customer First Board has been in operation since November 2021 and has excellent engagement from attendees across the Council and Customer First Champions. The Board tracks the Customer First activities which are all aligned to our Customer First promises.

- 2.15 The Customer First Board meets monthly and is chaired by the Corporate Director of Resources, Sarah Murphy Brookman, and the Corporate Director for Communities, Richard Barker. All directorates are represented on the board through the participation of Service Directors.
- 2.16 The Board is producing an 'Annual Report' to set out progress over the last year and priorities for the coming year. This is due to be published on the Buckinghamshire Council website in January 2022, following approval by the Customer First Board and CMT.



## Customer First high level workplan 2021-2022

2.17 Our Customer First deliverables and associated projects are outlined in the table below.

Project	Commentary	Policy	Process	People	Performance	RAG	Comments
1. Customer First Champions	Recruit across the Buckinghamshire Council a network of customer first champions, representing each service area, to spread the ethos throughout the organisation, and to meet and exchange ideas. Also, to feed into the Customer First staff award category			X			Delivered, with constant review
2. HR Training Modules and Assets	To develop a suite of online training modules, to allow regular, engaging refresher sessions to staff on customer-centric behaviours. This can also include face to face training and online			X			First two modules deployed with rest to go live as planned
3. CAPs+ Site Aylesbury move	Relocating the customer access point from The Gateway to the Walton Street office		X				Completed as planned
4. Push Notification Project	Looking at how we can expand the use of push notifications in key service areas – notably client transport, schools admissions, household waste, revenues and benefits		X				Work still ongoing – deployed in waste and client transport – completion by Spring 2023
5. CRM / MDM Procurement	Procurement in place to replace our three incumbent CRM platforms with a new, Council wide replacement solution. This open procurement is reaching its final stages with award expected in the next four weeks		X				Nearing completion by December 2022
6. Performance Dashboards	Working with the Power BI team to introduce performance dashboards, that allow us a daily view of key performance measures in our main, customer facing services				X		Completed and in use





7. Feedback Dashboards	The provision of feedback terminals in our CAP+ locations to judge customer satisfaction in our reception areas. In addition, the provision of digital feedback dashboards, attached to emails, that help us judge customer satisfaction in our services				X	Completed and in use
8. Service Area Improvement Work	Development work around customer-centric processes and procedures, to give our residents an improved service and more visibility of their requests. Examples include Client Transport; Parks and Areas of Interest; Southern Household Waste, Adult Social Care, and Registrars; Consultation work for Planning		X			Completed and in use; ongoing activity with services as required
9. Contact Us Forms	A review of the use of contact us forms, with a view to streamline the process, particularly in preparation for the new CRM system		X			Review undertaken with completion in line with CRM development plans
10. Informing Policy Decisions	Examples include working with the communications team to look at a more sensitive approach around the use of gender titles; Establishing a set of standards to encourage the use of plain language across the organisation; and including customer-centric attitudes into training, recruitment, on-boarding, and the C4P process			X		Completed and in use; customer training module in production for plain language comms
11. Cautionary Contact Register	This is in progress and due for completion by the end of the year	X				To be completed by December 22
12. Web chat	Improving and advancing the offering around web chat, using our current assets to the best of their ability, and looking for improvements	X	X			To be completed by the end of 2022




## Customer First high level workplan 2022-2023 – Project due to be started

2.18 There are also several projects in the pipeline for delivery across the next 12 months, summarised in the table below.

Project	Commentary	Policy	Process	People	Performance	RAG	Anticipated Completion
1. CRM / MDM Mobilisation and Implementation	Through a phased approach, streamlining our CRM down to a single solution from the incumbent platforms	X	X	X	X	Green	Split across 4 distinct phases: Phase 1: Summer 23 Phase 2: Winter 23 Phase 3: Spring 24 Phase 4: Summer 24
2. Customer Partnership Panel	Bringing together a customer-engaged panel of residents to help the Council look at our digital assets and how to make them more appealing and user-friendly for our residents	X		X	X	Green	Due to be in operation Q1 2023
3. AURA Programme	Supporting this piece of work, from the customer angle, as a critical friend, this work will include the HR CX programme	X				Green	Throughout 2023
4. Contracts CMA Database	To review and recommend, to identify contracts/activities which are approaching renewal and could be opportunities for improving customer experience	X				Yellow	This will be an ongoing activity – need to leverage SMG group to identify potential contracts to support.
5. Resource management	Helping service areas ensure they have the right resources in place to cope with demand	X	X	X	X	Yellow	Not yet available. This is an ongoing offering we can give services – available Q1 2023
6. Account management through Operating Level Agreements (OLA)	We can see the need for closer scrutiny of service areas, to see pressures emerge and triggers to identify where interventions may be needed. We will do this in conjunction with Customer Services Managers. This is combined with Service Area Audits and Performance Checks				X	Green	Ongoing through 2023



## **National Customer Service Week (3-7 October 2022)**

- 2.19 National Customer Service Week (NCSW) is the first full week in October, every year, but this was the first time that Buckinghamshire Council has formally celebrated the event.
- 2.20 NCSW provides the opportunity to raise awareness of customer service and the vital role it plays in service delivery. We wanted to recognise the impact of good customer service and the hard work of the teams making those experiences happen every day.
- 2.21 All employees have elements of customer services in their roles across the Council and the purpose of the week was to recognise the importance of remaining customer focussed and understanding the benefits of a great customer experience at all stages of a customer journey.
- 2.22 During NCSW 2022, the aims were to:
- Re-enforce the customer accountability culture.
  - Showcasing Customer First projects.
  - Launch new training for Customer Experience.
  - Raise Service Standards awareness.
  - Recognise our staff
  - Encourage staff to listen to live customer calls
  - Build network of customer champions.
  - Recognising best practise internally and externally.
- 2.23 The week was a huge success with great feedback from staff, senior management, and members.
- 2.24 Throughout the week, videos and articles were added to a dedicated NCSW page on the Source to share customer improvements, staff profiles and training opportunities, including the first Customer Experience training module (over 300 staff completed the first module during the week). The content was well viewed by staff during the week and the page will now be an ongoing resource area for sharing Customer First news and updates on demand to the wider workforce and ensure that Customer First framework continues to be visible to staff at all levels
- 2.25 Across the week, there were 43 staff who listened to live customer calls, either virtually or within the Customer Service Centre. Feedback was extremely positive, with staff around the organisation gaining first-hand experience and an appreciation of the current issues faced by our residents as well as the role that customer service agents provide at the start of the customer journey.
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- 2.26 It is imperative that we consolidate on the success of this initiative and encourage our staff to continue to listen to live (or recorded) customer calls and regular intervals and not just once a year. Customer Services has extended an “always on” invite to services to access live customer calls and it is recommended that shadowing is included in induction and training plans for new starters within the organisation. In addition, managers within services areas would benefit from regular call listening to better understand customer needs and identify any opportunities to improve customer and/or staff knowledge for resolving enquiries.
- 2.27 The Customer Service Centre has already setup a shadowing arrangement with the Highways team whereby new starters both teams spend time within each area to understand each side part of the customer journey. This type of collaboration is recommended to both upskill our staff and form closer relationships between service areas.

## **IMPOWER Review**

- 2.28 During the last quarter, the main area of development focus has been the completion of a Customer Services review with external consultants, IMPOWER.
- 2.29 Building on the foundations laid by the Customer Services service review in 2021, the Council commissioned a 14-week project IMPOWER to review customer demand and identify demand management tools which can be deployed to improve performance.
- 2.30 The scope of this work was to:
- Build a better understanding of the realistic volumes that the CSC should expect as we go through our Unitary journey
  - Clarity on what the volumes look like for a stable Unitary Council
  - Use and training of demand management tools that can be deployed/ deployed better
  - A better view of how to manage the CSC performance journey as it picks up Line of Business work as set out in the Service Review Business Case, with confidence that it is not too optimistic/ over ambitious at this point
  - Agreement on how to best respond to unexpected peaks in demand.
  - A clear approach on supporting particular cohorts who contact the Council by telephone where there are alternative solutions.

## Demand modelling

2.31 Impower were tasked with undertaking a full analysis of demand received in the Customer Service Centre.

2.32 A mix of data reports and sampling were used in the analysis as follows:

- All calls data from 8x8 for April to August 2022
- Firmstep and Data Capture wrap code report for October 2021 to June 2022
- Webchat summary report for May and June 2022
- Sample of 200 waste contact us forms received in late July and early August 2022

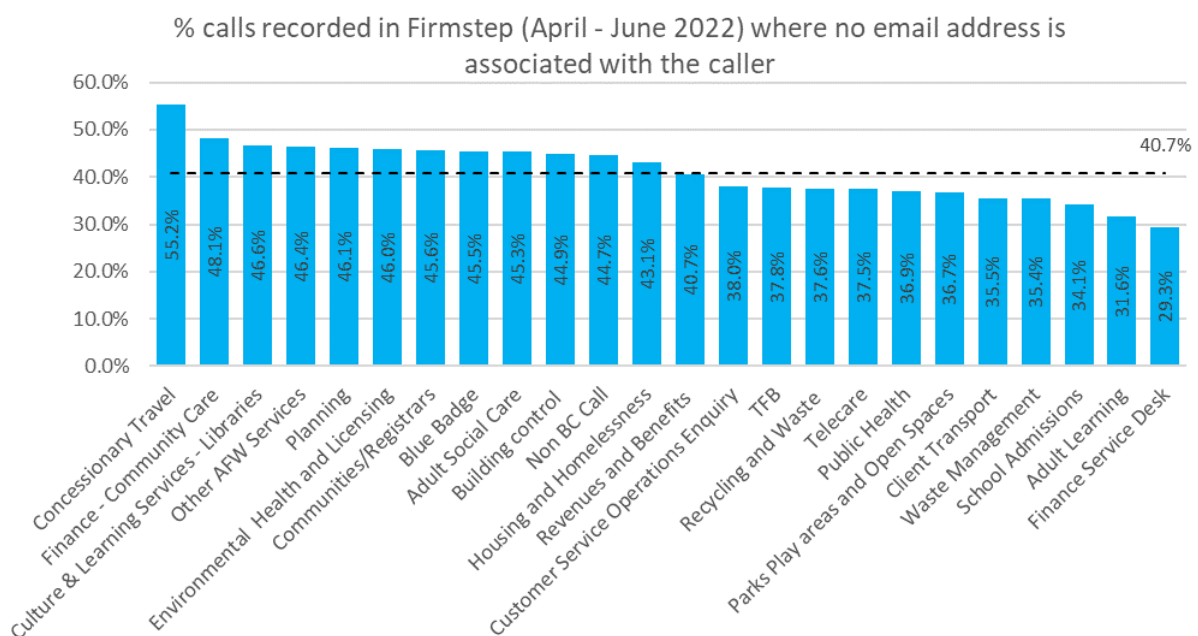
2.33 The keys findings from this analysis found that:

- Overall **calls to the CSC following a consistent pattern week to week** (and month to month), however there are **clear peaks in demand following known and unknown events** e.g., Council Tax reminders and summons letters or heavy rainfall.
- Modelling shows that, during that time, even with bridge funding there was an **8% capacity gap to be able to meet the 3-minute wait time** target across all call lines between May and August 2022.
- A **high proportion** of callers (44% of all callers who abandon) make the decision to **abandon the call around the time of the IVR message** – around 1-2 minutes into the call. The **majority (87%) of callers who drop out make a repeat call** within 7 days.
- **Callers to the benefits lines are the most likely to make repeat calls to other lines**, in particular the corresponding Council Tax line and to Helping Hands.
- There is **no email address recorded for 40% of callers, indicating these individuals may be less digitally able**. Callers for concessionary travel, community care and libraries were the least likely to have an email address recorded with callers to adult learning and waste the most likely.
- The majority (54%) of web chats were for queries relating to waste or Council Tax; overall **31% of webchats resulted in the customer needing to phone the CSC**.
- Detailed analysis of **contact us forms** received for waste showed that **41% of them were for tasks the individual could have completed via the website** and had not indicated that they had attempted to do so, and 34% where the individual had attempted to complete online but had run into an issue.

2.34 The outputs from this analysis were used to create demand and capacity and avoidable demand models to support future resource planning to better manage demand.

- 2.35 The **demand and capacity model** assesses the base demand (what an unexceptional day across all call lines would look like; what changes in expected demand (either from the avoidable demand modelling or elsewhere), capacity and target wait times have on the expected volume of calls; and how this differs to the capacity available.
- 2.36 Customer services can manipulate the expected demand and capacity per line of enquiry to calculate the likely capacity gap to service the total demand. This tool will now be used on an ongoing basis, alongside existing workforce planning tools, to prepare customer services for surge activity.
- 2.37 An **avoidable demand model** has also been produced – this takes the wrap codes from the CRMs as well as the digital exclusion analysis to assess where the greatest potential is to target avoidable calls and what the impact on overall call volumes could realistically be.
- 2.38 This model factors in the analysis completed around digitally excluded customers, who are unable to use digital services to access services or choose not to.
- 2.39 Across all call reasons, **40.7% of callers** has no email address associated with their customer record held on the CRM. We have used the lack of an email address being recorded for a caller (of calls recorded from April to June 2022 on Firmstep) as a proxy for digital exclusion. This is likely an over estimation as there will be some callers who are not digitally excluded but were either not asked or did not provide an email address. However, it does help us understand the trends across different call lines (**chart 1**) and the specific call reasons (**chart 2**) where callers are more or less likely to be digitally excluded.

**Chart 1**



## Chart 2

Call reasons (more than 50 calls) with the lowest proportion of digitally excluded callers

Topic	Reason	Total calls	No email address	
Waste Management	Waste Permit Scheme	61	14	23.0%
Customer Complaints	Customer Complaint	86	21	24.4%
SEN/SENDIAS	SEN/SENDIAS Enquiry	85	21	24.7%
Client Transport	Operational enquiries	67	17	25.4%
TFB	Compensation	94	27	28.7%
TFB	Street Lights	148	43	29.1%
Finance Service Desk	Finance Service Desk	133	39	29.3%
Recycling and Waste	Bin Enquiry	557	165	29.6%
Client Transport	Lost & replacement passes	53	16	30.2%
Recycling and Waste	Street scene Report it	120	37	30.8%
Adult Learning	Courses	316	98	31.0%
TFB	Dropped Kerb/Vehicle Access	99	32	32.3%
Telecare	Telecare Assessments/Referral	52	17	32.7%
TFB	Footway/Footpath Defects	159	52	32.7%
TFB	Verges/Ditches/Culverts	54	18	33.3%
TFB	Traffic Calming/Road Markings/Access Protection markings	66	22	33.3%
Adult Social Care	Disabled Facility Grant and other schemes	96	32	33.3%
TFB	Capital Maintenance	89	30	33.7%
Revenues and Benefits	Discount Query	68	23	33.8%
School Admissions	Admissions Directed to website	628	216	34.4%
Recycling and Waste	Missed Collection (too early/late to report)	279	96	34.4%
Recycling and Waste	Replacement/Upgrade Bin	1600	552	34.5%
Revenues and Benefits	Customer Payment not showing on account	55	19	34.5%

2.40 Callers to the **concessionary travel, community care and libraries lines** were most likely to not have an email address recorded; and those to the waste, school admissions and adult learning most likely to have an email address associated with them.

2.41 This analysis is helping us to gather feedback from our customers about the experiences that they have when they interact with the Council. The insight is informing improvements in customer experience across the organisation and allowing time and resources to be focused on where it is most needed.

### Listening tool

2.42 Whilst the Council is currently able to produce performance reporting at pace, using PowerBI and other tools to provide progress against key metrics, there has historically been a capacity issue to properly analyse customer feedback received via our access channels at scale.





through different access channels (e.g., calls, website, web chat). This insight can be used as evidence, alongside traditional performance reporting, to prove or disapprove a hypothesis for how to improve customer experience e.g. Residents being unable to view their Council Tax bill online is driving calls to the CSC.

- The tool was used as part of Waste improvement works to test the hypothesis that the timing of reporting missed bin collections was misunderstood and is driving calls to the CSC, resulting changes manage customer expectations on the web site.
- **Identifying emerging issues** - the tool allows you to narrow in on a selected period (from days to weeks and months). Feedback is categorised into themes and customer sentiments, so you can analyse the theme distribution changing over the time allowing for quick identification of emergency themes e.g., unable to make payments on a particular part of the website. The early identification of negative themes allows the Council to move faster to identify and remedy the root cause and restore the customer experience.
- **Staff feedback** – the listening tool is configured to allow the analysis of what customers are saying about their engagement with staff. This can be used both to share positive feedback (where it is not received as formal compliment) as well as identifying training needs. This feature has been used extensively within customer services to in the development of training plans.

2.47 The output from the listening tool and other feedback channels is to be used by Customer Services and service areas to monitor feedback and quickly identify service improvements and implement before they become major issues further down the line.

2.48 The use of the listening tool will also become integral to our account management function – regular meetings between customer services and key service representatives to discuss performance, calendar of events, future training requirements, ongoing projects etc.

2.49 Work is in progress to automate the extraction of feedback reports from source applications and feed directly into the listening tool, rather than the current manual process. This will allow users of the tool to benefit from the recent feedback received without relying on an officer to upload feedback at regular intervals.

### **Demand-led behavioural trials summary**

2.50 Working alongside colleagues in the Customer Service Centre and Customer First programme to understand demand drivers, and where Behavioural Science could be used to influence demand, six trial areas were identified.

- IVR messaging
- Webchat
- Transport for Bucks automated responses
- Waste & Recycling
- Housing and Homelessness
- Other correspondence

- 2.51 The trials were focussed on small changes that can be made to better manage customer expectations, improve signposting, and deflect avoidable contacts away from customer services. We used a trials approach to quickly test new ideas, get buy in across the council and evidence potential impact. Small changes were tested which required limited approvals or governance, meaning they could be implemented quickly
- 2.52 These trials were developed and delivered from July to September 2022 with next steps identified for each to ensure the changes are embedded and rolled out wider. A full breakdown of each trial and next steps can be provided, as required.
- 2.53 Delivering these initial trials showed us that the approach that was effective and should be used for future improvement work. By trailing the impact of small changes and then looking for opportunities for scaling, we were able to build confidence and ability and only scale up with what we know works.

### **Networking group**

- 2.54 Customer Services has previously been a member of a multi-Council networking and benchmarking group, but this group has begun to wind down, with a reducing number of members and little value created.
- 2.55 In response, IMPOWER have supported and facilitated a new networking and benchmarking group with other local authorities in August 2022.
- 2.56 The group which has representation from RB Kensington & Chelsea, Wiltshire, Surrey, South Gloucestershire, Nottinghamshire, North Yorkshire, Wokingham, Staffordshire, Somerset, and Hampshire Councils, and meets monthly to discuss best practice and approaches, as well as a commitment to share performance data as part of a new benchmarking cycle.
- 2.57 Initial feedback has been very positive and there has been interest from other Councils to join the group, including Oxfordshire and Northumberland County Councils. Although operating models may differ between Councils, which can make direct comparisons challenging, there is a shared ambition to improve customer satisfaction and rising to the challenge of meeting increasing customer demand with limited resources

2.58 Surrey were already facilitating a similar benchmarking group, which included East & West Sussex, Essex, Kent, Hampshire, Lincolnshire, and Lancashire County Councils. We have agreed to bring these two groups together for future meetings to form a wider discussion group to share best practice and uncover opportunities for improvement.

### **Performance framework**

2.59 As part of the IMPOWER review, we are developing a new Customer Experience Performance Framework that will be relevant to all Council services. This will primarily focus on external customers but will be made to be relevant to all customer relationships, including those with partners and colleagues

2.60 The performance framework objectives are:

- Consistency in our customer service offer
- Ability to know how we are performing against our customer service offer, both from within the Customer Service Centre and in Customer engagement across the council
- To enable us to quickly identify trends, variances, and issues, address them and monitor the impact of the action taken
- Use information and intelligence to help maintain, develop, and improve services
- Enable us to forecast future trends, the impact of demand drivers and incidents, informing decisions about where to deploy resources
- Clear expectations, roles, and responsibility in managing customer experience performance
- Hold each other to account

2.61 Within the framework, we are developing a prototype Customer Experience Maturity Model / Self-Assessment for understanding the state of customer experience across our Service Areas and setting objectives for how to improve.

2.62 Service areas will be encouraged to regularly self-assess how they are performing, and the Customer First programme will also undertake assessments/audits to review the overall council position against these promises

2.63 The maturity model will act as a self-assessment tool and will provide a view of each services' respective strengths in relation to the Customer First themes and promises

2.64 Each theme will be broken down into further statements and scores which contextualize and rate the state of the overall customer experience maturity across key service area.







- 2.65 The self-assessment can be used as an improvement roadmap for, helping to identify areas which are underperforming in terms of data, resilience, delivery, culture, measurement/benchmarking etc as well as other key themes within the Customer First framework.
- 2.66 The aim is to raise awareness and accountability within services, through self-assessments and regular audits. We will work with the internal audit team to implement an audit cycle once the performance framework and self-assessment has been agreed.
- 2.67 Results from each service assessment will be present as part of the series of quarterly customer experience reports.

### **Organisational Resilience**

- 2.68 IMPOWER were tasked with ascertaining the Customer Service Centre's resilience levels and ability to anticipate, adapt and move forward following disruption to our services, such as the four events highlighted above.
- 2.69 Over the course of the project, IMPOWER have introduced their Resilience Framework which they have developed, which focuses on six key characteristics of resilient organisations:
- *Strong leadership and decision.*
  - *Staff engagement, empowerment, and wellbeing*
  - *Learning driven improvement and innovation*
  - *Leveraged finance and performance intelligence.*
  - *Resource planning and flexibility.*
  - *Effective and collaborative relationships.*
- 2.70 *The IMPOWER framework then looks at resilience across three capabilities...*
- ***Absorptive capabilities*** – *the ability to undertake rapid change to be able to persist and keep going during a shock.*
  - ***Adaptive capabilities*** – *the ability to make incremental changes to be able to move forward.*
  - ***Anticipatory capabilities*** – *the ability ensure positive changes are sustained and optimised, and to prepare for future shocks.*
- 2.71 The challenge for our customer ambition is to build these three capabilities across the six key characteristics so that planned and unplanned disruptions to services or surges in contact demand, are managed proactively without significant reduction in service levels e.g., call wait times, call abandonment and ultimately, customer satisfaction.

2.72 Workshops have been held with Customer Service and Human Resources staff to gauge the relative strengths, weaknesses, and opportunities to grow the six organisation characteristics.

2.73 Following the workshops, the following opportunities were identified:

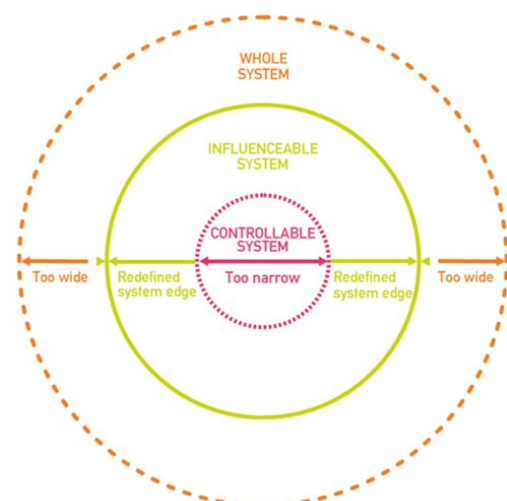
 <p>Ensure <b>strong leadership and decision making</b> by doing more to celebrate the positives, including the corporate improvement team in service reviews and using conditions for success consistently during projects</p>  <p>Ensure <b>leveraged finance and performance intelligence</b> by knowing customers and what is important to them, measuring what is useful rather than what's easy to measure, and seeking out and acting on customer feedback</p>	 <p>Ensure <b>staff engagement, empowerment and wellbeing</b> by reviewing wellbeing resources to ensure quality, do more to celebrate the positives and clarify what staff would like to be upskilled in</p>  <p>Ensure <b>resource planning and flexibility</b> by ensuring buy-in from services around a demand calendar, having an agreement with services to redeploy people when needed and better handle pressure from members</p>	 <p>Ensure <b>learning driven improvement and innovation</b> by holding a lessons learned session after each disruption, learning with our partners and other organisations, establishing a culture of positive risk-taking and using a framework rather than rules based approach to make decisions by</p>  <p>Ensure <b>effective collaborative relationships</b> by emphasising One Council policies to staff and maintaining open and honest communication with the services</p>
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## Spheres of Influence

2.74 To achieve our customer centric ambition, it is vital that the Customer First programme widens the lens, looking beyond the Customer Service Centre to the whole council.

2.75 Doing so will enable:

- Commitment to a single customer experience vision
- Avoidable demand to be addressed at the cause
- Shared ownership of improving customer experience
- Senior Leaders to see their role in achieving the vision
- A better customer (and staff) experience



2.76 Customer Services not only needs to focus on what is controllable within its own operation but how it can influence other services to improve the overall customer experience.

2.77 During the IMPOWER review, the project team considered what actions could be taken to support the ambition, which are summarised in the table below.

Controllable actions (within the CSC)	Influenceable actions (outside of CSC direct control)
<ul style="list-style-type: none"> <li>• Use of CRM, forms packages and knowledge bases</li> <li>• Resourcing (can flex according to priorities and across channels)</li> <li>• CSA skills and development and training programme</li> <li>• Customer record and updating systems able to access</li> <li>• Triage tools that staff can access</li> <li>• Prompts on phone messaging to encourage self service</li> <li>• Communication with other services – strong SLAs to control behaviours and encourage knowledge share</li> <li>• Follow up details to customers to advise on progress</li> </ul>	<ul style="list-style-type: none"> <li>• Services through account management meetings</li> <li>• Professional support available from services</li> <li>• Digital transformation of service request</li> <li>• Sharing of call data to inform services which activities are driving progress chasing calls</li> <li>• Signposting from other departments</li> <li>• Communications going out through mass mailings</li> <li>• Drive from members and leaders to centralise transactional activities</li> <li>• Back-office systems and processes</li> <li>• Support team for all cloud applications</li> <li>• Ethos of a single, uniform customer journey</li> <li>• Provide system access to agents to deliver more at first point of contact</li> <li>• Customer First Champions network</li> </ul>

2.78 Customer Services will continue to work with services, through account management sessions and deep-dive assessment workshops to deliver these actions.

### Next steps

2.79 It is imperative that the findings and progress made during the IMPOWER review do not lose momentum now that the review has concluded.

2.80 As we start to define the next phase of the Customer First programme, the following next steps need to be taken:

- **Getting whole Council input** into defining the ambition – group engagement session using the Customer Champions network.
- Using the **spheres of influence alongside the avoidable demand modelling** to identify the priority areas of **avoidable demand** and where the control sits to be able to influence them.
- Extend the use of the listening tool to teams outside of Customer Services, sharing invaluable feedback and insight for use in improvement work.
- Continue with a **trials approach** to quickly kick-start change, testing out new ideas, getting engagement from across the Council and demonstrating impact as the programme develops.

### 3 Other options considered

3.1 Not applicable

### 4 Legal and financial implications

4.1 Not applicable

### 5 Corporate implications

5.1 HR - co-produced a draft peripatetic workforce model and will be required to support recruitment (assessment centres) for permanent and casual bank of customer staff

### 6 Local councillors & community boards consultation & views

6.1 Not applicable

### 7 Communication, engagement & further consultation

7.1 Not applicable

### 8 Next steps and review

Month	Action
<b>November 2022</b>	<ul style="list-style-type: none"><li>• Recruitment to Customer Partnership Panel begins</li><li>• Customer First Annual Report (1 year on)</li><li>• Revised Customer First communication plan to item within Customer First Annual report (visible corporate champion)</li><li>• Customer Experience embedded into C4P, interviews, recruitment packs and inductions</li><li>• Call shadowing embedded within inductions and training plans</li><li>• Listening tool extended beyond CSC</li><li>• Behavioural science trails to be extended.</li></ul>
<b>December 2022</b>	<ul style="list-style-type: none"><li>• Customer maturity assessments to begin</li><li>• Award of single CRM contract</li><li>• Peripatetic workforce / casual bank launched</li><li>• Launch of Customer Partnership Panel - Co-produce standards with residents' panel</li><li>• Webchat procurement to commence December 2022</li><li>• Listening tool data feeds to be automated to provide near real-time intelligence.</li></ul>
<b>January 2022</b>	<ul style="list-style-type: none"><li>• Mobilisation of CRM implementation</li><li>• Customer First Annual Report published on website</li></ul>

## **9 Background papers**

**9.1** Not applicable

