

## **TAUNTON DEANE BOROUGH COUNCIL**

**EXECUTIVE – 24<sup>th</sup> August 2005**

### **CUSTOMER ACCESS STRATEGY**

#### **REPORT OF THE HEAD OF CORPORATE SERVICES**

**This matter is the responsibility of Executive Councillor T Hall**

#### **1.0 Purpose**

- 1.1 The purpose of this report is to consider the adoption of a Customer Access Strategy.

#### **2.0 Background**

- 2.1 A Customer Access Strategy should set out the Council's aspirations for the way in which it wants to relate to its customers in the future. As we potentially move towards a Joint Venture approach to delivering some of our services, and increasing the number of partnerships that we work with it becomes increasingly important to have this clarity.
- 2.2 The attached Strategy was initiated following informal discussions between the Executive and CMT in January/February.
- 2.3 Subsequently, workshops have been run with the Review Board, staff and managers to help influence the development of the Strategy.
- 2.4 The Review Board considered the draft strategy at their meeting on 4<sup>th</sup> August 2005.

#### **3.0 Recommendation**

- 3.1 The Executive is recommended to adopt the Customer Access Strategy.

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# **Customer Access to Services Aspirations for the next ten years**

## **1.0 Background**

1.1 Many organisations, both public and private sector, have spent considerable sums of money researching their customer's needs. The general outcomes are not surprising, and clearly apply to Taunton Deane's customers.

1.2 Customers want:

- Contact when it is convenient to them;
- Easy methods of contact that suit them;
- A quick and correct response;
- A result.

1.3 Customers do not want:

- To be kept waiting;
- To be passed from "pillar to post";
- Bureaucracy getting in the way;
- "Press 1 for... press 2 for...";
- To repeat what they have already told us;
- To have to understand who specifically provides their public services;
- To report failings/problems and have no service improvements follow.

1.4 The Audit Commission has set criteria on achieving excellence in customer access. These relate to ensuring that citizens have choice, convenience and control in accessing services from the Council. The Commission have identified the following context for customer access:

- Services should be easy to access;
- Services should be supported by technology that is appropriate to meet customer needs;
- Council should respond to customer feedback and complaints to improve service quality and access to services;
- Council should use partnership working with neighbouring Councils, organisations and businesses to continually improve access to services;
- Council services should focus on the whole community;
- Council services must ensure equality of access and take proper account of equality and diversity of all service users.

1.5 Many surveys show that customers' generally preferred method of communication is by telephone. We need to recognise, however, that the preferred communication will depend upon the individual and his/her particular service requirement at the time. Thus the same customer may prefer different

methods of communication for different issues. There are many channels that are available, including:

- face-to-face;
- post;
- e-mail;
- internet;
- SMS text messaging;
- automated kiosks;
- digital television; and
- fax.

1.6 In some service areas – particularly where original documents are required to be seen – face-to-face contact is likely to continue. In other areas, technological progress will see a continuing expansion in the use of electronic means of access. With this variety of access channels it is important to ensure a consistency of approach so that the customer receives the same information and level of service regardless of the channel used.

1.7 We need to recognise that the average cost of a transaction differs considerably according to the access channel used – 12p for self service on line, £2 per telephone call, and £9 per visit (Source: Cabinet Office Performance and Innovations Unit 2001).

1.8 At present Taunton Deane is in the top quartile of all English district councils for service satisfaction. We have remained at a consistent level at a time when the average performance of district councils across the country fell by 12%. We cannot become complacent. There are two key elements which contribute to this level of satisfaction:

- the standard of customer service;
- how well informed people feel about the Council and its services.

Our approach to customers is, therefore, fundamental.

1.9 The work currently being done on the Joint Venture initiative (known as Integrated Services in Somerset or ISiS) is fundamentally linked to Customer Access:

- ISiS is an approach to enabling the delivery of our customer access aspirations by releasing resources from back office, support services and transactional services.
- ISiS will require the partners to have a single, combined Customer Access Strategy. This will mean that our Strategy and Somerset County Council's Strategy should be aligned comfortably as the project develops. Perhaps unsurprisingly the broad messages of the County Council's recently adopted strategy and our own draft strategy do align fairly well, though work will be needed to fully integrate them.

## **2.0 Our Aspirations for Customer Access**

- 2.1 If we are to move forward and improve our customer relationships we need to have a clear picture of where we want to be. All of our decisions can then be made with this long-term outcome clearly in mind.
- 2.2 Our aspirations, which are developed below, have been informed by the results of a number of previous customer surveys. Members have been involved through an informal Executive discussion and a workshop at the July 2005 Review Board meeting. Staff, managers and CMT have also been involved. Customers have not yet been directly consulted on the proposals, but extensive consultation will need to take place as our aspirations are developed into reality.
- 2.3 The consultation with Members and staff revealed a number of key themes – a fuller summary is at Appendix A:

### **2.3.1 Service Delivery**

There are many services that we deliver well either individually or in partnership. We need to ensure that our partnerships are delivering the outcomes we want.

In some areas customers are directly involved in service improvement – this should become the norm for both front line and support services.

### **2.3.2 Access**

Customers already have a variety of access options, and our website is recognised as one of the best. We know, however, that our website will become an increasingly important way of delivering services and we must, therefore, continue to improve it

### **2.3.3 Staff**

Our staff are seen as hardworking, loyal, friendly, approachable and willing to help

### **2.3.4 There are areas that we know we need to improve**

Closer working with Somerset County Council – our Customers often do not know, or care, that we are separate organisations. We should be more joined up in our service delivery

We need to improve our response times to written and telephone communications.

We need to become more people based, and put the customer at the forefront of everything we do

We need to ensure our staff are highly trained in customer service and well motivated to deliver excellence

We will never have enough resources, so we must prioritise and in doing so, we need to help customers have realistic expectations of what we are able to deliver. This means that we need to be clear on our priorities and communicate them well.

We need to ensure services are delivered, whether directly by us or through our partners, at the point where they are needed – leading to localised and personal service provision. We need to acknowledge that we live in a rural community and need to ensure services are accessible to all, considering options including video conferencing and rural surgeries.

We need to be clear on what our customers really want from us, and not make our own assumptions about what we think they want

An overriding message is to be clear about what we want to do, and then do it.

### 3.0 **What do we want our service delivery to look like in the future?**

3.1 Our Key Aspiration is that:

**We will put the customer first.  
Service delivery will be socially inclusive; defined and driven by  
customers needs.**

3.2 In other words, we want nothing less than excellence in customer relationship management – and it is the customer who defines what excellence means.

3.3 Most organisations would probably subscribe to this aspiration, but few could deliver it. This is because it is all too easy to pay lip service to excellent customer service. Doing this properly means reaching and serving more people in more ways, in more places, and at more convenient times than ever before. It is about doing what we do very differently in the future.

3.4 In practice this means that we will:

- deliver services in the way customers want;
- offer multiple, fully integrated customer access alternatives;
- offer self service and facilitated service options;
- ensure direct service delivery is available within as many of our communities as possible, whilst maintaining Taunton as the cohesive centre, with Wellington as the main sub centre;
- ensure that service delivery decisions are taken as close to the customer as possible. This means empowering front line staff to become leaders of change;
- aim to continuously improve the quality, effectiveness and efficiency of services to deliver ongoing increased customer satisfaction;

- ensure social inclusiveness in service delivery;
- ensure that our communications compliment and contribute to improvements in service delivery. We will use communications facilities to promote our customers access strategy. We will ensure our customers are fully involved in the development of our plans and kept fully informed as this progresses.
- ensure that we organise ourselves and our services around the needs of the customer, not necessarily around our needs;
- ensure that customers do not need to know which level of local government provides the service they require, by providing seamless, joined up access with Somerset County Council and any other partners.

3.5 We want to achieve our aspirations in a context of redirecting rather than increasing resources.

#### 4.0 What could this look like?

4.1 It is important to look at this issue from the customer perspective – how will the customer recognise that our aspirations are taking hold and affecting our service delivery?

4.2 Specific improvements that we can expect to realise include:

- Increased choice for customers in the way they can access our services
- Improved customer service including:
  - Greater consistency of service
  - Greater competency and accuracy
  - Higher standards of service
  - Improved efficiency and faster service delivery.
  - Reduced waiting times
  - Higher percentage of service requests resolved at the first point of contact and
  - Friendlier more customer-focused staff who are able to effectively empathise with customers, understand their service needs, prioritise their problems and deliver services exceeding their expectations
  - Increased recognition of rights and needs in terms of service delivery consistent with our commitment to the Equalities agenda
- Improved customer satisfaction including:
  - An improved knowledge about and perception of the Council
  - High levels of satisfaction with public services.
- Reduced cost of delivering services:

- Greater use of, and investment in, technology
  - Less administration
  - Economies of scale and
  - Freeing up the time of specialist staff to focus on value-add activities.
- Enabling greater public access to information without waiting for a complete process reengineering in the back office
  - Improved communications with our customers, including helping customers to use the most appropriate access channels
  - Significant contribution to the achievement of BV 157, electronic government targets
  - Better management of information at all levels
  - Improved staff satisfaction by providing staff with:
    - The opportunity and tools to fully resolve customer enquiries
    - New and improved opportunities for development, progression and job satisfaction.
  - Improved relationships with stakeholders and other Partner organisations.

## 5.0 In practice this will mean a number of things for the Council:

5.1 The development of a single customer services organisation for the public to access our services. This will be responsible for managing the implementation and operation of all Customer Access facilities, organising and rolling out service centres to offer face-to-face services, the contact centre for telephone services, and web presence to provide a self-service option. It will also be responsible for providing a plan and road map for operating the facilities, driving significant improvements in the quality and cost of delivery, and improving customer satisfaction. If the Council decides to become part of the Joint Venture with Somerset County Council, this would be a single operation within the new organisation.

5.2 A radical transformation programme that ensures that administrative processes, organisation, management philosophy, customer involvement and staff development will achieve excellence in customer service. This approach will lead to:

- Elevation of customer service within the Council to clearly focus attention on this as the pre-eminent theme and driver across the organisation
- A customer service ethic from 'within' the organisation that helps set the standard for service to the public

- A new definition of leadership and more visible emphasis placed on customer service excellence outcomes throughout all levels of the Council. This can be developed alongside the work on defining our core values.
  - Managers will be responsible for ensuring that their staff are fully empowered to provide excellent services and have the necessary tools, training and other support needed.
  - Managers and staff will be recognised and rewarded for making improvements to customer service – even when the initiative is proved to be inappropriate – i.e. mistakes are allowed, if they stem from attempts to provide excellent service.
  - Decision making by front line staff at the coal face – these staff being encouraged to make decisions and pursue innovation in the pursuit of excellence in customer service.
  - Fewer middle managers - committed to innovation and business change - and truly empowered staff
  - A flatter organisation, with wider spans of control
- 5.3 Working with partners to provide physical, one-stop-shop service centres providing face-to-face services within reasonable proximity to all citizens. The service centres will provide customers with a quality environment operated by friendly and professional staff to handle a wide range of services on behalf of ourselves, the County Council and potentially other partners.
- 5.4 The corporate communications strategy will be updated to ensure it supports the customer focus ambitions of the Council.
- 5.5 A simple list of contact numbers for all Council services, answered through a multi-function contact centre that will grow incrementally to accommodate a team of service advisors focused on servicing the needs of customers.
- 5.6 A simple, interactive self-service access to an ever-growing list of services through an ever-growing set of electronic channels.
- 5.7 A consistent technology infrastructure and business architecture that supports these multiple customer access channels and ensures consistent customer service across channels, enabling customers to alternate their use of channels as wished or required for a single service experience.
- 6.0 **What Now?**
- 6.1 Our aspirations should inform and support the work being undertaken on the ISiS project. This initiative may be key to the delivery of significant elements of our aspirations. If we really want to progress towards delivering customer



excellence, however, we cannot simply wait for the Joint Venture initiative to begin to deliver results in 2 or 3 years time. It is important, therefore, to identify those areas that will complement this initiative and can and should be progressed. It is also important to recognise that delivery of our aspirations will need very firm leadership.

6.2 In working towards our aspirations a number of steps need to be taken:

**1. Develop a set of core values that reflect the customer-focussed organisation we want to be.**

Work is already advanced on developing our core values through the efforts of an existing project group. It will be important to ensure that the core values, once fully developed and agreed, are communicated clearly to all staff. Even more important will be ensuring that the values are fully understood, internalised and put into practice by everyone in TDBC to help bring about the significant culture change that will be necessary.

This work can and should continue to its conclusion outside the ISiS initiative, as it will help to establish our own identity and culture. This should then permeate all our services, not just those that might become part of a Joint Venture or any other partnership arrangements.

**2. Consult customers on:**

- the hours they want to contact us;
- how they want to contact us;
- where they want to have face-to-face contact;
- where they want remote access to services;
- the improvements they want to see made in customer access/service delivery.

Historically we have a good record of sound consultation with our customers, particularly in relation to the specific services provided and determining our priorities. In most areas, however, we have done relatively little to determine how and when customers want services delivered.

It is proposed that a project group comprising Members and officers is formed to drive forward this consultation. It is likely that this group will need to integrate with any consultation done by the ISiS initiative.

The results of this consultation should then be used to inform future developments in customer access.

**3. Develop an ingrained culture of excellent customer service right across the Council** through a radical programme of culture change. This will fundamentally change the way in which we manage the

relationships with our customers – delegating decision making as far as is possible and empowering front line staff to pursue excellence.

- 4. Review the management arrangements at all customer contact points** with a view to integrating all management through Customer Services, which will then enable the integration of our services so that the “one stop shop” principles are applied to all services at all customer contact points.

Through the Somerset Direct project we have made significant progress in the integration of our telephone service to customers. The aims for Customer Services include fully dealing with 80% of calls. This ensures that, wherever possible, the customers’ issue is resolved by the first person they speak to, and avoids the “being passed from pillar to post” scenario. Work needs to continue to bring remaining services into the customer services system and to continue the process of going “wider and deeper” with existing services.

We need to develop this capability to all services at all customer contact points, effectively giving the customer a “one stop shop” at each face to face transaction. This will require the integration of frontline reception facilities into a single management framework to ensure a consistency of delivery. Work has already begun on this with the integration of Benefits reception, The Deane House main reception and the Wellington Community Office into Customer Services. Other areas will be integrated as telephony services are brought fully into Customer Services.

In partnership, we will aim to provide a physical service centre within a reasonable drive/public transport time of 99% of the population. There will need to be different sizes of service centre, but all will provide direct access to the same excellent standard of customer service.

A three-tier structure for face-to-face service delivery through a network of service centres is the most logical solution:

The largest Service Centre - would be located within Taunton itself. A smaller, Local Service Centre - would be located in Wellington as a catchment area with a lower population. Finally a range of Service Outlets, possibly offering a more limited set of services based upon local needs, would be established in more rural areas or in specific urban communities in cooperation/partnership with a third party such as the County Council, post offices, or Citizens Advice Bureaux or other established community groups/facilities.

We will need to ensure that the premises we use to deliver face to face services are fit for purpose, in the right location and offer appropriate facilities to meet the needs of customers. It would also make sense to

work with Somerset County Council to ensure the best use of our respective premises within the Deane.

We should also look at when it is best to take the service to the customer rather than the other way around, and how peripatetic and mobile service delivery can help us to do this.

**5. Ensure that technology supports and enhances customer access and service delivery.**

Technology is one of the keys to making significant improvements to customer access, both through enabling the re-engineering of processes and through the specific application of tools customers can use such as the Internet, automated kiosks and Digital TV.

In some of these areas – Internet, e-mail and data imaging, for example – work continues to progress on improving what we already do. This work can and should continue alongside the ISiS initiative as it directly affects all of our services. The expanded use of the website and other self-service technologies (cash machines and kiosks etc) will be fundamental in the transformation of service outcomes and improving performance in service delivery. The improvements and consequent efficiency gains will, however, only be achieved if the technology is useful, usable and used appropriately. These should become our watchwords as we continue to develop our technological capabilities.

In other areas the ISiS initiative has the potential to radically improve our capability to deliver technological solutions. In particular, the provision of community based technology should be properly co-ordinated with Somerset County Council's provision in order to ensure joined up, effective and efficient service delivery. This, therefore, is an area where partnership working should be pursued, whilst ensuring that delivery is informed by clear consultation with customers.

**6. Work with partners** – particularly Somerset County Council - where possible to maximise resources and provide joined up services.

TDBC is already committed to a number of important partnership working arrangements, with more, such as in Building Control and Waste, being developed. The most significant partnership potential lies with the ISiS initiative, which will involve Somerset County Council, a private sector partner, and potentially other District Councils within Somerset. One of the key drivers for this partnership will be improved customer access delivered through process re-engineering, maximising economies of scale and realising efficiency gains.

**7. Develop meaningful targets** – so that our achievements towards customer excellence can be monitored and continually improved.

## 7.0 Without a Clean Sheet.....

7.1 Our aspirations would be much easier to achieve if we started with a clean sheet. The reality is that we are already involved in many issues which have a Customer Access impact and which could be affected by our aspirations and the potential for a Joint Venture to be established. It is important, therefore to take stock of what we are currently involved in and make decisions on what we should continue to do – because it brings us nearer to delivering our aspirations; and what we should cease to do – because it moves us away from them.

7.2 The proposals are:

- Customer Access Principles – clearly the list of initiatives below cannot be exhaustive. It is incumbent upon all managers and staff to use the basic principles established by our aspirations in assessing all current and potential projects;
- Digital television – currently low scale usage, no further development until such time as the potential for increased usage makes this economically and effectively viable;
- Somerset Online Portal – this is providing a useful electronic signpost for our web based and telephone services. This approach is now being adopted at National level as good practice. We should, therefore, continue to support the portal.
- Customer Relationship Management system (CRM) – a key aim of the CRM has been to provide a single customer database, which will finally enable a customer's records to be linked. This is expected to be achieved in the version of the CRM that is currently being tested before full installation.
- Taunton Deane Web Site – recently praised as one of the best in the Country. We know that this can be improved and work should continue on developing and enhancing the website, particularly through the use of Sharepoint. Serious efforts to be made to ensure the accuracy and timeliness of information on the website.
- Customer Services/Somerset Direct – continue to develop the service as planned, though we will need to be much firmer about how we resource this.
- Customer Complaints and Compliments System – currently under review. This review should continue with the aim of simplifying the complaints process for the customer.

- Electronic Document & Records Management – we need to develop a corporate plan for progress. Until this is developed, no new areas to be launched, though we should continue to archive paper documents and develop workflow methods where we have already started. We should also evaluate the pilot schemes in Parking Services and invoicing to influence the way forward.
- Financial Management System (FMS) – we know that our FMS is creaking and needs replacement. A project to procure a new system has been put on hold during the development of the ISiS initiative as it is anticipated that any future Joint Venture organisation would probably provide such a system. The procurement should remain on hold, though work being done on improving processes should continue.
- Revenues and Benefits system – a procurement project is ongoing aimed at replacing the in-house Revenues and Benefits system by March 2006. This project is 2/3rds funded by the government and this funding will be withdrawn if the project is not completed by 31<sup>st</sup> March 2006. To avoid the loss of significant external funding, this project should continue.

Kevin Toller  
Head of Corporate Services  
August 2005

## **Summary of Outcomes of the Members and Staff Consultations**

### **There are many areas where we believe we already deliver well**

Many of our specific services were identified as providing a good or excellent service.

Our website is recognised as one of the best - but we know we can improve it particularly to ensure that more transactions can be completed online without customers having to use a further access option to complete their transaction.

We provide a range of access options, and need to ensure that those without IT access can still receive service from us.

Our staff – most of whom are seen as hardworking, loyal and willing to help

The way in which we answer telephones (though not the speed of doing so)

We consult well, and respect the outcomes of our consultations

We work well with our partners – but need to work to ensure the partnerships deliver outcomes we want

We make it easy for customers to pay us by phone and online

In some areas customers are directly involved in service improvement – this should become the norm

We see ourselves as friendly and approachable

We have a great deal of expertise

### **There are areas that we know we need to improve**

We do not always deliver on our promises and targets (though we recognise that our target are not always achievable)

Our premises can be daunting and impersonal

We do not promote our services well

We are not always available/open when customers want us

We are not good at sharing good practice and lessons learned

We use too much jargon

We expect customers to come to us

We need to ensure that the equipment we use is both up to date and fit for purpose

We need to reduce telephone queuing

We need to improve our response times to written communications

Closer working with Somerset County Council – our Customers often do not know, or care, that we are separate organisations. We should be more joined up in our service delivery

We need to ensure our staff are highly trained in customer service and well motivated to deliver excellence

We need clear goals and focussed leadership to achieve them

We need to improve our links with the community and our customers

Delegation of responsibilities needs to be clear and properly managed

We need to improve both our internal and external communications

We need to reduce absenteeism

We need to become more people based, and put the customer at the forefront of everything we do

We need to deliver services at the point where they are needed – leading to localised and personal service provision

We need to reduce staff turnover in both customer service and specialist staff

We will never have enough resources, so we must prioritise

We need to help customers have realistic expectations of what we are able to deliver

We need to be more active in identifying and using best practice from elsewhere

Parking for customers is limited

We need to acknowledge that we live in a rural community and need to ensure services are accessible to all, considering options including video conferencing and rural surgeries.

We need to be clear on what our customers really want from us, and not make our own assumptions about what we think they want

We need to celebrate our successes and good practice

Decision-making can be far removed from the customer interface

We need to be consistent in our customer service standards

We need to review our achievements and learn from our mistakes

Our principle should be getting it right first time

We need to focus on outcomes rather than processes

Our services need to be more joined up; the silos need to be broken down

We need to be more efficient

We need to become more proactive and stop fire fighting

We need to ensure that our work and resources are targeted towards achieving our objectives so that we deliver on those areas that we need to

**We saw others providing excellent customer service which meant:**

They promoted themselves well

They went that little bit further

They listened with interest, patience and empathy

They took a pride in their work, service or product

The staff used their initiative and took responsibility

They were always civil and courteous

They invested

There was a “human touch” – customers are treated as individuals

**Reception staff who had the authority to make decisions**

They were easy to access at the time required

Their websites are clear, easy to use and up to date

The services are transparent – there are no hidden extra costs or details



As a minimum, they do what they say they will do.

The staff are able to deal with the problem, are knowledgeable and give correct advice

**An overriding message was to be clear about what we want to do, and then do it.**