

REPORT OF: STRATEGIC DIRECTOR

TO: EXECUTIVE

DATES: 17th SEPTEMBER 2015

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CUSTOMER ACCESS MANAGEMENT STRATEGY

PURPOSE OF REPORT

1. To seek approval from Members for the Customer Access Management Strategy.

RECOMMENDATIONS

2. It is recommended that the Executive give approval to:-
 - a) the Customer Access Management Strategy and Action Plan provided at Appendix A;
 - b) using £92k from the Council's ICT Strategy Reserve to meet the implementation cost of the Strategy (as shown in the Business Case at Appendix B).

REASONS FOR RECOMMENDATION

3. This strategy has been developed to recognise the changing demands on public service delivery and the need to become more efficient and reduce operational costs whilst becoming more responsive to the new ways customers wish to access our services. It sets out the actions to be taken to deliver the improvements required and to meet the vision and aims of the Council in respect of future customer access.

BACKGROUND

4. Over recent years progress and improvements have been made in a number of areas to improve customer access to Council services. For example, there has been:-
 - a website refresh to create a fully responsive site which works on desktops, tablets and mobile phones;
 - an increase in the number of services available on the website, particularly with interaction through web forms
 - the provision of Allpay and an increase in internet payment and Automated Telephone Payments (ATP) usage as the number of services that can be paid for using these methods has increased;

- a greater understanding of our customers' needs so that we can identify appropriate contact methods;
 - a review of avoidable contacts to improve processes that mean customers can obtain services without necessarily contacting the Council direct.
5. However, there are further improvements to be made. The areas we want to concentrate over the next couple of years, are:

- ***Responsiveness***

Ensure that information and services are more accessible to customers and, in particular, enabling them to identify and select the services which are relevant to them when it suits them.

- ***Improve service efficiency and effectiveness***

To provide more streamlined services from start to finish. This would:

- vastly reduce the need for paper based transactions;
- reduce information being handled by more than one person;
- reduce the amount of duplication;
- reduce manual input by staff;
- reduce avoidable contact;
- improve customer service for those who have no choice but to contact the Council.

- ***Reduce costs of service delivery***

Using more cost effective delivery channels as outlined in the strategy, would potentially provide savings for the Council.

ISSUE

6. Currently the majority of Council services rely on the customer either using the telephone or visiting one of the Council offices. For example, if a customer wishes to tell us about moving house the Customer Service Advisor in the Contact Centre or Area Office can record information received from customers but cannot process the information. The request is passed to the Revenues Service through a typed service request. Handling the information twice makes the service slower, more expensive and open to higher levels of risk/error. This invariably leads to a longer timescale than necessary before the customer receives the correct amendment to their account. Customers often contact us to find out what is happening – this leads to an increase in telephone calls and further paperwork being generated.
7. Similarly where we have web-forms for customers to order services or tell us of changes online, there is no integration with back office systems. Someone manually picks up the request or information and inputs it to another system or manually processes it. An example of this is that payments for services are made via a separate system to the request themselves, and manual invoicing is required. All of this takes time, incurs duplication of effort and adds costs to delivering services to the customer. Again customers contact us due to delays or not understanding what is happening incurring more work and increasing the amount of time it takes to deal with the issue.
8. A recent Annual National Digital report states that 'councils are wasting 2 million hours each year by rekeying data that could be automatically input to systems'.
9. In addition, customers are bound by the opening times we operate either by telephone or face to face in our offices. Extending those times would cost more in resources and facilities and at a time when we are expected to reduce our operating costs substantially, this would just not be possible.

10. As part of the transformation of service provision, a revamped Council website was launched in January 2015. The new website is fully responsive, working on any device, desktop or mobile. Since the launch of the responsive site, mobile access has increased rapidly from an average of 30% during 2014 to an average of 42% for 2015 so far.
11. The Council website currently has 68 active forms, all of which work well responsively. All of these forms are emailed to a generic email address (albeit with no back end integration into other systems). In 2014, completed forms averaged around 300 a month. This has risen to around 600 a month in 2015, but this is still a fairly low number considering that the website is the cheapest way of requesting a Council service. The website can handle a much bigger volume of requests without any extra cost to the Council. With successful back-end integration, and marketing of the available forms, we can promote channel shift. Eventually, our aim would be to make the Pendle website the main channel for information and services 24 hours a day, 7 days a week, 365 days a year.
12. The Customer Access Management Strategy aims to address these issues and to assist the Council to become more efficient and effective at delivering services.

STRATEGY SOLUTIONS

13. There are a number of projects under the overarching strategy. These are broken down as follows and a short description of what they aim to achieve for both the customer and the Council are included. Further information and suggested timescales are shown in the high level action plan.

Preparation and engagement for change

14. When making changes like this it is key that all affected parties, from customers to those who support them, are aware of the changes and their effects. A programme of engagement would be developed with customers to look at the ways in which they contact the Council. This will ensure that an appropriate choice of channels is available and will identify mechanisms to support and enhance the service experience of those who cannot use digital service methods.
 - To put this in place the Council will engage with numerous customer groups and third party organisations (including housing associations, Citizens Advice Bureau and local councillors) providing them with a full overview of the changes that would take place. At these sessions all questions and concerns would be addressed. This is critical in ensuring that changes can occur smoothly.
 - To ensure that customers without internet access or proficient IT skills can still access the services, the Council would put in place various support mechanisms including an assisted self-service area based in the Market Street Customer Service Centre. We would also engage with partner agencies and staff in libraries to develop further face to face support. All of these initiatives would be tested before being rolled out and publicised through the contact centre, website, Council updates and at face to face meetings.
 - All staff working for the Council would be provided with a script that would allow them to outline to customers how and where they could receive support, should they not have internet access at home or need specialist assistance.

- In addition, Customer Service Advisors would be trained in the self-service processes so that if a customer contacts them for assistance they would be able to talk the customer through the process directly. Help pages and explanations would be available on each web page so that the customer can see exactly is needed. An assisted service can be provided for those unable to complete the forms online themselves.

System changes and enhancements – channel migration

15. One of the largest areas of customer interaction is Revenues and Benefits. Around 6,700 new claims and 53,000 change of circumstances are received each year, taking on average 19 and 7 days respectively to process. Customers constantly contact the Council to advise of changes, tell us they are moving and more often than not, chase up to see what is happening because they have heard nothing or do not know what the process is.
16. By implementing an online service which integrates with our current back office processing system (Northgate) the Housing Benefit service will be more accessible to customers. They could make a claim or tell us of changes at any time, from the comfort of their own home or while out and about via their mobile device. They can be more pro-active in managing their accounts with the Council and have information available without having to ring up or wait for a written response.
17. Importantly, to the customer this means:
 - Service is available 24 hours a day, 7 days a week 365 days a year via the Pendle website

Citizen Access – Council Tax

- Customers can view their account and bills online
- Customers can tell us about moving in and out, apply for or cancel a single person discount, set up or change a direct debit and apply for exemptions and discounts whenever they want
- Customers will get a full view of the information they provide and can print copies if they wish to refer to in future

E-Benefits – Housing Benefits and Council Tax Support

- Customers can view their account online
- Customers can put in a new claim and advise us of changes to their circumstances whenever they want
- They can see when their next benefit payment is due
- Customers will get a full view of the information they provide and can print copies if they wish to refer to in future

To the Council this means:

- Customer information is gathered electronically through forms and delivered into Northgate for review = reduction in paper, scanning and indexing of documents
 - Reduction in the amount of time taken to process a claim or change as there is no need to key the customer data into Northgate
 - Reduction in the amount of calls asking for information or chasing progress
18. Eventually the Council would have the opportunity to switch to 'digital by default' meaning that access to specific services would be online only. However there are a number of important stages to go through to get to that point.

19. Development of channel migration plans and marketing campaigns will be required. Looking at the demographics of Pendle we will determine the best ways of communicating with customers to help them get the most out of the services available to them in ways which suit their needs. Campaigns will be targeted, so for example, customer groups who are very much into technology and like using their mobile phones for everything, are likely to respond better to texts than email and definitely more than by normal paper post. Campaigns will show customers what services are available, how they can access them, how much easier and quicker it will be to do so and encourage them to try out the services identified for them.
20. The current website will continue to be optimised so it is easy for customers to find what they need quickly on any type of device. We will work with partners and others who deliver services to our customers to share the delivery of help and support for those who find it difficult to access services. For example there are a number of community groups who already hold events to help those who are elderly or have special requirements. Libraries have online facilities in their branches and we will work with them to join up support for people who need this.
21. The Council is also replacing some of its legacy systems with a new one, iDox. This will reduce the license and annual support costs for the Council and join up back office working. It will also allow customers to track applications, make comments and receive alerts for Planning, Building Control, Land Charges and Licensing. This gives the customer the ability to be more pro-active and to get involved in their area and community.
22. In addition to the new iDox system, the programme also wants to bring further services to the customer through the website and give them the ability to deal with waste and environmental issues online. Examples of these would be:
 - Bulky collection
 - Missed collection
 - Container delivery
 - Miscellaneous items
 - Fly tipping
 - White goods collection request
 - Reporting problems
 - Pest control
 - Dog issues
23. Whilst web-forms already exist for these services, there is no integration with the back office systems and therefore everything needs to be manually input to systems and handled separately. Automating these services and giving customers confirmation that their requests have been received will result in more effective and efficient service delivery. Customers will be able to follow their request from start to finish. This should encourage more confidence in their digital interactions with the Council.

Continuing business improvement

24. Some other, ongoing improvements also need to be made. These are:

Improving the payments systems and making more types of payment available

- This would join up the customer request online to the payment made and get rid of the manual administration in the back office.
- Reviewing and enhancing the types of payment available through Allpay, Civica Webpay and the automated telephony payments system, will mean that more options will be available to the customer and allow us to reduce our cash handling resource, banking costs and in turn review the future viability of cash offices.

Enhance our communication with customers

- Use of social media to provide information and updates to customers, improving our response times to service issues
- Update the telephony interactive voice recognition (IVR) to make sure that customers know they don't have to wait in a queue but can get their information and services or make payments online
- Use text messaging (SMS) to remind customers of appointments, payments due etc.
- Review all paper materials to make sure they are up to date showing customers where and how they can interact with us

Further service delivery improvements

- Provide as many online services as possible. As customers grow in confidence and use online services more often, the easier, straightforward types of enquiries received by telephone and face to face are likely reduce. The ones likely to remain are the more complex and time consuming ones which need someone to talk through the issues. Reviewing the breadth and depth of service knowledge and experience for Customer Advisors will be a part of this programme to ensure that they will be able to transition to different types of enquiry in future.
 - Join up customer requests through the back office departments so that services are delivered as quickly as possible, customers know what is happening and do not have to chase us for updates.
 - Improve our service delivery processes so it takes less time to deliver, saving both time and resource and providing a more efficient service to the customer.
 - Look at mobile solutions which allow officers to update customer information whilst out of the office
25. This programme of work is designed to both improve our service delivery to the customer and also to challenge our existing ways of working. This is to make us as efficient and effective as we can be to reduce our costs whilst being responsive to the changing ways in which services are being delivered for the future.

IMPLICATIONS

Policy

26. Review and amendment to the Risk Based Verification policy for Housing Benefits will be required.

Financial

27. A business case has been developed of both the costs and benefits arising from the implementation of Phase 1 and Phase 2 of the Customer Access Management Strategy. An analysis of the Business Case is provided at [Appendix B](#). Phase 1 will focus on the e-Revenues (Online Council Tax Accounts, e-billing, e-statements etc) and Phase 2 will focus on e-Benefits (including Risk Based verification).
28. Phase 1 is expected to cost £47k to implement. This payback in savings from this investment is expected to be within 2 years, with net annual ongoing savings of £58k from 2018/19. Phase 2 is estimated to cost £45k with payback again expected within 2 years and net annual ongoing savings of £93k. Overall, the net annual ongoing savings will be c£150k.
29. It is proposed to fund the cost of the investment to implement the Customer Access Management Strategy (overall cost is estimated to be £92k) from the ICT Strategy Reserve.
30. The Council has already agreed to implement the IDOX solution; the business case for this has previously been considered by the Council.
31. Implementing the further continuing business improvements – review of the payment system, integration between front/back office systems, mobile solutions are likely to have additional costs/benefits to the Council. As these are developed and invest-to-save funding is required, further reports will be submitted to the Executive as required.

Legal

32. None arising directly from the contents of this report.

Risk Management

33. Included within the programme of actions and each subsequent project.

Health and Safety

34. None arising directly from the contents of this report.

Sustainability

35. Making sure that local residents and other visitors can access information and services at any time, at their convenience. Digital services are a sustainable way for the Council to do business and to communicate with a range of audiences.

Community Safety

36. None arising directly from the contents of this report.

Equality and Diversity

37. A full Service Impact Assessment has been completed on the draft Customer Access Management Strategy.

APPENDICES

Appendix A - Customer Access Management Strategy and action plan
Appendix B – Business Case for the Customer Access Management Strategy

LIST OF BACKGROUND PAPERS