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Pendle Customer Access Management Strategy

September 2015

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Contents

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Revision History

Change History

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Approvals

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Customer Access Management Strategy March 2015

1. Introduction and background

Pendle Council exists primarily to provide services for the public and is therefore judged on our ability to deliver. For most people the Council is the first and fundamental point of contact for public services. Whilst a mix of urban and rural communities, Pendle has a growing population and a significant ethnic minority in some parts of the Borough. There are large pockets of deprivation and relatively low public access to technology. That said, the number of people accessing, and wanting to access services online and through mobile technology, is increasing.

Like all councils, Pendle continues to face significant reductions in the amount of money available to spend on services and there is a need to balance providing good quality service delivery with making efficiencies.

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 providing new and more efficient ways for customers to access our services

In the Council's strategic plan for 2015 – 2018 there are a number of actions and objectives which relate to customer access management.

In the Headline Actions and Key Projects under "Working with partners and the community to sustain accessible services of good value"
Develop further options to reduce the net cost of Council services and to achieve a balanced budget over the medium term

In the Values:
To make the best use of all our resources to deliver our services as efficiently, effectively and economically as possible

In Continuous Service Improvement
"…it also provides the opportunity to transform the way we provide services, and the expectation that other methods of service delivery will be considered, with the best options for future service delivery being recommended"

And in IT
"The IT Service will work with services to exploit technology, remove duplication of data entry and storage, integrate IT solutions and streamline processes. This will ensure that ICT is a key channel in improving the services we provide to people who live and work in Pendle."

Our vision for customer access and management is simple:
Delivering accessible services of good value and good quality

2. Reason and aims for the strategy

The reason for this strategy is to help to ensure that the Council's resources will be focused on achieving its objectives, to benefit the residents (customers) of the Council.

It is not just Customer Services who need to be involved in access management but all Service Departments who have contact with the public. The majority will have contact either by telephone or face to face, others may produce letters or information and therefore also need to focus on achieving the objectives set out in this strategy. Developing new ways in which to deliver services to the Council's customers will require Departments to review their processes and ensure that they can offer their services through a range of channels and to be more cost effective and efficient.

There need to be very close links to the Council's IT Strategy and Service Department plans to make sure that the benefits of technology are introduced appropriately to maximise efficiency and effectiveness and enhance the customer experience. All need to buy in to the vision and deliver in their areas in order to improve service delivery and provide a more effective and efficient Council.

The main aims are:
- To provide the vision and key areas of action to deliver the Council's aims over the period agreed
- To identify how the Council can change and maintain services in order to meet changing customer demand
- To identify how changes can provide efficiency savings for the Council
- To ensure that services have the flexibility to meet the challenges of future service provision

3. Strategy timeline

This strategy is designed to cover a two year period and should be used to inform service managers' annual delivery plans. It links in with the overall Council Strategic Plan and needs to be aligned with annual budget setting.

4. What is the vision?

Over the last few years there has been some progress and improvements in a number of areas.

- Website refresh
- Provision of Allpay facilities to expand payment options;
- Increase in internet payment and ATP usage
- Increased level of services available on the website – interaction through web forms

- Developing knowledge of our customers so that we can identify appropriate contact methods
- Review of avoidable contacts to improve processes

However, there are further improvements to be made and there are four areas in which we want to deliver improvements and measure:

- **Accessibility and digital inclusion**
  Ensure that customers can access services conveniently and efficiently through a variety of access channels

- **Responsiveness**
  Ensure that information and services are more accessible to customers to enable them to identify and select the services which are relevant to them

- **Improve service efficiency and effectiveness**
  To provide more streamlined end to end processes which negate or vastly reduce the need for double handling, duplication and manual input. Reduce avoidable contact and improve service to the customer.

- **Reduce costs of service delivery**
  By utilising more cost effective delivery channels, ensure that the Council realises efficiencies from the delivery of the strategy and investment in technology.

The vision for the Council is to understand customer demand and work to ensure that services deliver what is required. By the end of 2017, the Council will have improved and streamlined service provision to customers and delivered efficiency savings.

Achievements will be measured by:

- Increased customer satisfaction in the way they can access services
- Improved service integration – reduction in the amount of processes which require manual intervention
- Increase in the services available for customers to complete online
- Increase in the percentage take up of self service and usage of internet
- Reduction in face to face and telephony contact and the resource required to deliver this
- Improvement in delivery of KPIs
- Reduction in the costs of handling cash and cheque payments
- Reduction in costs to deliver annual billing and HB & CTR notifications
- Management information developed, which supports the understanding of customer groups, locations and use of services

5. Achieving the vision

In order to achieve the vision, the following objectives for change have been identified.

5.1 Accessibility and digital inclusion
Ensure that customers can access services conveniently and efficiently through a variety of access channels. Use of MOSAIC to provide demographic intelligence on residents.

- Engage with customer groups to determine accessibility requirements
- Identify mechanisms to support and enhance the service experience of those customers and groups who cannot utilise digital service methods
- Improve public internet access at Market Street, Customer Service Centre and provide assistance to those customers who wish to self-serve
- Review the potential to work with partners and other organisations to provide further access to services
- Advertise a range of contact channels for hard to reach groups
- Publish translation service information

5.2 Responsiveness
Ensure that information is more accessible to customers and enable them to identify and select the services which are relevant to them.

- All leaflets and literature to be available on the website
- Publish and promote links to web forms which will take customers directly to the forms without having to search.
- Publish information about and promote take up of online Housing Benefit and Council Tax services
- Review of website and contact methods to focus on improving the customer journey. Ensure that all services take a consistent approach with online service delivery principles and provide a quick and efficient method of contact for customers
- Review all elements of service and information delivery across all departments to ensure a common and consistent approach
- Promotion of website as the main channel for information and services

5.3 Improve our infrastructure and systems to deliver on service demands, improve accessibility for customers, and deliver more efficient and effective services

- Implementation of iDox Uniform- replacing existing systems and reducing licensing costs

- Provide web based services to allow customers to access their information securely online and to enable self-service across the majority of services the Council offers
- Develop end to end process integration to take out manual handling, duplication, drive down cost of delivery and improve performance
- Review of the website and forms to enable the streamlining of customer information delivery to the right service departments and systems
- Review Civica payment system to ensure more efficient online payment delivery and reconciliation of payments and orders/invoices to reduce back office payment matching and duplication of work
- Take advantage of opportunities to close the loop on fulfilment of customer requests and transactions, allowing better communication of what is being completed and when, which will reduce the need for follow up communication
- Improve website to allow more transactional services and sufficient information on pages to allow customers' questions to be answered prior to completing forms where possible
- Develop options and deliver solutions for mobile working within services to improve efficiency and speed up responses to customers
- Review of all Interactive Voice Response (IVR) to ensure that messages directing customers to the website services and payment facilities are prominent

5.4   Reduce costs of service delivery

- Promote Direct Debit as default method of payment to all customers and the website as the main source of information
- Review the potential for rationalisation of counter services and sharing with partners or other organisations
- Review all payment methods and move all cash transactions to Allpay, internet and ATP payments
- Continue with the rationalisation of core operational systems to reduce licencing costs on current systems and improve the process handling between
- Review resource requirements for service delivery as the strategy is implemented

6. Draft high level action plan

The draft action plan is attached at appendix 1.

Indicative timescales have been included but these are dependent on when the Council makes a decision to progress with the strategy and securing resources to complete the work.

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Appendix 1 – High level action plan

Customer Access Management Strategy Action Plan							
Preparation and set up							
Ref	**Strategy actions**	**Action detail**	**Priority 1, 2 or 3**	**PBC Benefit**	**Customer benefit**	**Timeframe**	**Additional information**
P1	Understanding the customer experience – evaluation of barriers to digital inclusion and an approach developed to improve accessibility	A programme of engagement with groups representing customers with specific requirements in the ways in which they contact the Council to ensure that an appropriate choice of channels is available. Identify mechanisms to support and enhance the service experience of those who cannot utilise digital service methods	1	Active engagement with customers, listening and learning from experience and providing services which are appropriate	Ability to engage with the council and have a say in how services are provided	Sept 15 - ongoing	This will feed into customer communications and engagement plans
P2	All services to actively engage with customers to obtain their up to date email addresses and contact details	The ability to engage meaningfully with the customer about what information will be available to them and how, depends on how we can reach them. All service departments should ensure that they obtain accurate and up to date contact details from the customer on contact and update their systems	1	This will allow the Council's services to be promoted appropriately to customers and reduce the amount of incorrect information held on systems	Customers will be contacted appropriately on the details held	Aug 15 - ongoing	
P3	Improve first point resolution	Resolution tool in place. Analysis of data needs to be completed and plan of action agreed	1	Potential to reduce the number of customer queries and provide a slicker service	Customer satisfaction improved.	Sept 15 - ongoing	This plan will feed into customer communications and engagement plans and inform the web form integration processes

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P4	Monitor emails to inform the creation/amendment of web forms and published information	Monitor the volume and type of emails to establish if the enquiry could have been resolved via the website content or via a web form. Actively promote the alternatives in responses to the customer to encourage channel shift.	1	Potential to move a volume of enquiries to website content or self service	Customers are able to access what they need, when they need it	Aug 15 - Oct 15	Data capture and analysis of email requests to be completed and FAQs to be created to address most enquiries
P5	Gather customer intelligence - use of MOSAIC	Develop management information which supports the understanding of customer groups, locations and use of services	1	Ability to manage customer channels much more effectively	Customer satisfaction with method of service delivery and access	Sept 15 - ongoing	This will feed into customer engagement plans
P6	Publish links to existing web forms	Publish and promote links to web forms which will take customers directly to the forms without having to search.	1	The easier it is to find a form and complete it, the more likely it is to be used. Higher volumes of self service will reduce the capacity required for f2f and telephony delivery	Customers are able to access what they need, when they need it	Sept 15 - ongoing	
P7	Publish translation service information	Clearly indicate on the web pages, how a customer can access translation services of obtain information in a format suitable for their needs	2	Improved customer satisfaction and meeting customer needs	The ability to obtain information which is in a format which meets customer needs	Sept 15 - ongoing	

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Phase One - infrastructure, systems and set up							
Ref	Strategy actions	Action detail	Priority 1, 2 or 3	PBC Benefit	Customer benefit	Timeframe	Additional information
1.1	Deliver a web based customer registration service with customer authentication (Northgate Citizen Access for R&B)	Northgate Citizen Access to be purchased and implemented to integrate directly with the R&B system.	1	By promoting online services and encouraging e-billing and self- service, there is the potential to see a reduction in the amount of traffic to offices and through telephony. This would provide the ability to reduce resource required to deliver F2F and telephony services. Reduction in paper, scanning and indexing costs	Customers would be able to access their information online directly, sign up for e-billing and be able to inform us of changes in circumstances without having to visit an office or make a telephone call. This will be more convenient for the growing number of customers who prefer to access services online through their pcs and mobile devices.	Oct – Jan 16	Self-service for customers. Registered and authenticated citizens can: Make account enquiries; view instalments due and payments made; register for e-billing and update contact details; view bills & recovery notices; view benefit statements; view details of next benefit payment; view current benefit claim status. In addition the Self-Serve pages allow members of the public to report changes in circumstances; new customers to the council; moves within the area; applications for SPD; cancellation of SPD; change of name; setting up or amending payment by direct debit
1.2	Implementation of iDox Uniform-replacing existing systems	Systems replaced Comino Planning, xAssist Newhart - Planning & Building Control, Limehouse - Planning Consultation, APP - Flare, Lalpac - Licensing, Swift - Land Charges, Aligned Assets - LLPG, Swift - websubmissions, Pitney Bowes - MapInfo, GGP WIN - GGP mapping, Volcano, Oracle - Land Charges.	1	Reduced IT annual support and maintenance costs, infrastructure etc. Reduction in number of resources required to process cases due to integration between modules. Reduction in licences required. Reduction in duplication and double handling through more joined up service delivery	Online access to information - through the website portal - and links to the National Planning Portal to make online applications. Introduction of Building Control and Licensing information and ability to report and request information online	Sept 15 - Jun 16	This will allow customers to track applications - Planning, Building Control, Land Charges and Licensing. They can also make comments and sign up to receive alerts about planning applications in their area.

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1.3	Review Civica payment system for online payment delivery	Development work is required on Civica to ensure that web forms and payments will match and not cause more work in the back office. Potential API required to ensure authentication of payments.	2	Reduce amount of back office work matching payments.	Customer will have a much better experience in line with other online payment methods	Aug - Nov 15	Currently the website form and payments are separate and can not only cause confusion for the customer but may mean additional work back office as the payment may not be made at the same time as the form is completed or vice versa. Manual intervention is required to match payments or follow up customer to make payment
1.4	Project to review all payments and move to less expensive methods of collection and delivery.	Allpay is significantly cheaper to manage than ATP (set up and maintenance costs are high). Review other methods such as Paypal and look at potential for simple bank accounts for those benefit customers who do not currently have an account for payments to be made to. Need IVRs to move customers automatically to ATP so that no CS are logging payments.	2	Reduce or remove the cash and cheque payment methods - this will reduce banking costs and resource required to manage these payment methods. Potential to remove cash offices altogether (see rationalisation of offices)	Customers would be able to make more payments online and through Allpay. There will be some resistance. Need to have campaigns and awareness building around this. Tax likely to be an issue as cash offices used for this in the majority	Nov 15 - Mar 16	Main issues are that it costs the Council to collect, manage and bank cash and cheques. Volumes of both are high - 67% of payments are cash and 20% by cheque. Need to determine if Council is willing to look at a longer term migration to cashless payments? Also need to review rental and mortgage payments being made - potential negotiation with Pendle Housing to manage their own payments?

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1.5	Development of middleware and web forms to produce structured data which could then automatically input to back office systems and start off processes or cases	Current forms will need to be reviewed and amended in order to get data in the format required for automated input to systems. Services to be reviewed to prioritise. This **may** be an interim measure for the processes identified as priority dependent on potential iDox development work. The priority services will be drip fed with campaigns/promotion to customers to encourage take-up on a three monthly basis	3	This would allow promotion of self service to customers. In turn this would reduce the amount of telephone calls, paper, scanning and indexing. It would also encourage customers to do more online and therefore promote more of a self- service ethos.	Web forms would allow further self- service for the customer and require less interaction to receive updates or view progress	Mar -Sep 16	These priority services would cover the highest demand transactions for Operational Services and Environmental Health: Bulky collection; Missed collection: Container delivery; Miscellaneous items; Fly tipping, White goods collection request; Reporting problems; Fly tipping; Pest control; Dog issues
1.6	Review of all Interactive Voice Recording (IVR) to ensure that messages directing customers to the website services and payment facilities are prominent	Actively promote online services and automated payments.	3	Reduction in the amount of calls and call-backs if customers understand that they can conduct their business online or make a payment without waiting to speak to an advisor	During busy periods it may be more appropriate for the customer to go online to conduct their business rather than waiting for an advisor.	Jan - Feb 16	

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Phase One - customer engagement							
C1.1	Advertise range of contact channels for hard to reach groups	Ensure that we widely advertise the range of contact channels available, particularly to hard to reach groups, for example visually impaired customers	1	Improved customer satisfaction	The ability to engage with the Council on a meaningful level and access the services required	Nov 15 - ongoing	Will need to be reviewed as services are developed online
C1.2	Use of social media as a customer engagement channel	Develop a plan to utilise social media to assist in a) channel migration campaigns, b) increase awareness of online facilities and encourage customers to sign up, c) service issue responses	1	Increase in customer awareness of the facilities and services provided by the council. This should help to reduce contact through other methods and also build the digital culture internally.	Customers who are engaged with social media will be able to interact with the Council in a user friendly way on the devices they currently use	Nov 15 – Feb 16 and then ongoing	Outcome = plan for use of social media
C1.3	Promote pre-registration for Council Tax billing and HB notifications	Series of campaigns to be planned to raise awareness of online R&B services and to increase take up. Existing communications with customers should be used – letters, emails and when calling the contact centre – together with a defined programme of contact to encourage customers to sign up online to the new service.	1	By promoting online services and encouraging e-billing and self- service, there is the potential to see a reduction in the amount of traffic to offices and through telephony. This would provide the ability to reduce resource required to deliver F2F and telephony services. Reduction in paper, scanning and indexing costs	Customers would be able to access their information online directly, sign up for e-billing and be able to inform us of changes in circumstances without having to visit an office or make a telephone call. This will be more convenient for the growing number of customers who prefer to access services online through their pcs and mobile devices	Dec 15 - Feb 16 then ongoing	Outcome = plan for registration take up and implementation. Website information to be updated and promotional pages and banners to be developed.

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C1.4	Build and deliver channel migration campaigns	Series of campaigns to raise awareness of online services and increase take up. Existing communications with customers should be used - letters, emails and when calling the Contact Centre. Programme of contact to be put into place in conjunction with the social media plan above	1	Potential to reduce the amount of traffic to offices and through telephony. This would provide the ability to reduce resource required to deliver F2F and telephony services. Reduction in paper, scanning and indexing costs	This will be more convenient for the growing number of customers who prefer to access services online through their pcs and mobile devices.	Jan 16 – Dec 16	Outcome = plan of campaigns for channel migration in early 2016 Campaigns to be structured around the same message set and with a 3 month lag between to re-baseline and analyse uptake. The time periods will also help to avoid customer message blindness
C.1.4	Plan to move to Digital by Default	Many councils have increased their use of self service by reducing the amount of services which are delivered by Face to Face (f2f) and telephone. This then effectively moves those services to the website. A programme of engagement, communication and marketing to be put into place to migrate specified services to Digital by default	3	Reduce the amount of f2f and telephony resource required to deliver as services are replaced online as self- service only	Customers may not be happy about the reduction in f2f and telephony services and satisfaction could therefore decrease	Apr 16 - ongoing	Need to agree the scope of services and timescales to migrate
C1.5	Promote Direct Debit as default method of payment to all customers	Actively promote payment of Council Tax by Direct debit to new and existing customers. Campaign to raise awareness of the online facility.	2	Improved collection rate and reduction in the amount of paperwork required	The provision of online set up will be easier for the customer to manage as they will not need to print off, sign and send into the Council. This should encourage take up.	Feb 16 - Apr 16	Customers will also be able to view their account, when payments are due and what payments have been made.

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Phase two - further development of systems and digital take up						
2.1	Improve website to allow more transactional services and sufficient information on pages to allow customers' questions to be answered prior to completing forms where possible. Remove contact email addresses and telephone numbers - use only where necessary.	Use of the Northgate solution and iDox will provide the majority of volume transactions. Review remainder to further streamline- currently some web forms are emailed to individuals which needs to change, and generic email addresses are still used.	1	Reduction in the amount of manual intervention - particularly around emailing individuals.	Customers would have the ability to complete more service requests online and potentially have a quicker turnaround time	Mar - Aug 16	Commercial waste enquiries; Cemeteries; Property Services; Democratic Services; Highways; Corporate Policy; Pest Control; Economic Development Set up online forms to capture structured data which can then be used to start processes in back office systems
2.2	Review all paper information, advertisements, customer leaflets etc., for all service departments to ensure that website and digital methods of contact are to the forefront and become the main focus for customers	Fitting in with the programme of customer engagement, this review should cover all elements of customer communication. The outcomes of the evaluation into the barriers to digital inclusion should be taken into account and if necessary a separate strand of communication can be developed for these groups	1	By promoting email and telephone numbers, customers will continue to use these even when they could use the online facilities. By reducing the presence of these contact details there is the opportunity to further increase traffic to the website and online services	Signposting for customers to online facilities will help them to find what they need when they want it rather than having to call or visit an office	Mar - Jun 16 - ongoing	Outcome - plan for changes required to information and any costs for reproduction
2.3	All leaflets and literature to be available on the website	Ability for customers to download and print out forms and literature. This would again be a method of referring customers to the website where they should be able to self- serve	2	Reduction in the amount of printing and paper and the requirement to hold stocks within offices	Customers are able to access what they need, when they need it	Jun 16 - ongoing	As the online services are developed this should be constantly reviewed to ensure that all information is available digitally on an ongoing basis - this will need to be the responsibility of service departments

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2.4	Promotion of website as the main channel for information and services	Promote the website as the main access point for Council's services and transactions. An ongoing programme of messages, re-education and incentives to be developed	2	Channel migration and increased volume of online usage will deliver the Council's aims and help to reduce cost of delivering F2F and telephony channels	More availability for the customer to engage and transact with the Council when they want to	Jun 16 - ongoing	Outcome - plan for promotion of website
2.5	Explore the potential to work with partners and other organisations to provide further access to self - service?	Review the potential with the Library and others- this could potentially include online help and a series of events to bring awareness of digital services and assistance to those who struggle with this area	3	Ability to share the burden with another partner in educating customers on digital matters and increase usage of the Library whilst improving online take up	Customers have another opportunity to use online facilities if they do not have their own access	Sept – Nov 15	Potential for partnership working - which may help with resource and space issues at the Customer Service Centre
2.6	Improve public internet access at Market Street, Customer Service Centre	Review current provision of 2 pcs and the information available. Potential to provide/enhance wireless network solution. The aim is to make this slicker and more accessible. Also review the availability of assistance and potentially provide further access	3	Ability for customers to self - serve would reduce waiting times for f2f delivery and also encourage online usage in future	Customers would be shown how to use the facilities and therefore would become more proficient in helping themselves in future	Jan – May 16	Dependent on available resources and the space to provide this service.
2.7	Review resource across Liberata and PBC with a view to ensuring optimum usage following the implementation of the IT solutions and enablers in this programme	In light of the changes to provide more efficient service and the potential increase in self- service, a review of the staff levels delivering customer service across the departments should be undertaken. This will identify any areas where roles are no longer required which could potentially be utilised elsewhere or savings realised.	1	Potential to reduce the amount of capacity required if self - service take up is improved and services are utilised much more online		Sep 16 - ongoing	

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| 2.8 | Review the continued viability of outlying offices as actions such as movement to Allpay, internet payment and ATP, together with increase in self service delivery, would potentially allow for closure | Base lining detail provided to enable a view on resource requirements. Decision would need to be taken by Council | 2 | Provision of services in different ways could reduce the need to keep outlying offices open. Reduction in overheads and resources | Customers may not be keen on losing their local office but providing services online and through Allpay would deliver a similar service to that currently | Feb - Jul 16 | |

Potential Future development							
F1	Potential implementation of iDox Public Access for Service Requests. This has not yet been developed, there are no timescales for delivery and also the cost has not been identified. This may be considered as a future development and an interim solution has been identified below	Web based platform to provide ability for customers to see information and allow them to complete service requests through the PBC website. These would then be processed into Uniform with an API connecting to CRM so that CS Advisors could view cases and also input new cases on behalf of telephony customers	3	Removal of duplication of data input, direct integration with the back office would start processes without having to have officer input, reduces processing time, reduced telephone calls as customer could view progress of case, reduction in paper, scanning and indexing costs	Online access to information - through the website portal will allow customers to self- serve and will start the process immediately. Customers should receive confirmation of their request and also when completed	Jun 16 – Jun 17	Still awaiting information from iDOX on potential development timescales and costs
F2	Provide mobile working solutions	To be identified when the development of iDox has been completed. Potential mobile solutions for Planning, Building Control, Env Health etc. Need to identify if HB/CT visiting officer could use Northgate online to submit forms?	3			Dec 16 – Jul 17	Still awaiting information from iDOX on potential development timescales and costs

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