



## **Transformation Programme**

### **Citizen and Customer Contact Programme**

#### **Appendix 1 Plan Phase Recommendations**

Issue Date 12<sup>th</sup> April 2017

## BACKGROUND TO RECOMMENDATIONS

The Programme Team undertook considerable work during the Analyse Phase to help shape the future direction of travel for Citizen and Customer Contact. They completed research and drew upon local and national knowledge to provide guidance and case studies on potential sourcing options and alternative delivery models available to Bracknell Forest.

- The change in approach to Citizen and Customer Contact facilitates redesign of other areas of the Council and allows us to make cost savings across a number of services.
- It sets out a Blueprint for the customer experience against which all customer facing services can be re-set
- It facilitates a reduction in cost of high volume/low complexity transactions, and communications, by shifting to self-service digital channels
- It supports resources being prioritised to those in need, resulting in improved outcomes and reduced costs for these individuals
- It facilitates monitoring and control of costs by ensuring visibility of contact, and contact management meets agreed standards

The team worked with staff across the Council and partners to develop the Customer Experience blueprint.

For Citizen & Customer contact, the blueprint is made up of nine 'dimensions'. Its features are:

Dimension	Components
Citizen	Experience, insight, channel design.
Service	Definition, design, differentiation, research and development.
Communication	Brand and style, marketing, information, media.
Process	Automation, system design, governance, infrastructure.
Finance	Charging, costing, strategy, budgeting.
Technology	Mobile working, applications, web presence, business continuity.
Information	Knowledge, data and intelligence, risk, performance.
People	Skills and competencies, structure, culture, management.
Collaboration	Partnership, contracts, whole systems thinking.

**These 9 dimensions underpin all the aims and objectives of the Citizen and Customer Contact transformation Programme.**

We will implement the principles developed in the blueprint across all services and across all customer access channels.

### **Our model for the future: the citizen**

Residents of Bracknell Forest take responsibility for themselves and play an active role in their community. They live independently, are well informed about what the Council does, and understand what the Council does not do. They provide support and assistance in their communities. When they need to access Council services, they do so through their online account and use digital, self-service channels as a default.

### **Our model for the future: the service**

Customer journey design is used to ensure services focus on the customer, and on the activities that add value. Routine, transactional services are digital and self-service. Assistance is provided to those customers who need it to be able to access digital channels. More complex services, for customers with higher needs, are better coordinated, and managed through a key contact

**Our model for the future: communication**

Our communication is open and engaging, and facilitates two-way conversation with residents. We are a trusted source of information and news, and residents understand what the Council does for them and for the area, and feel well-informed about the things that matter to them

**Our model for the future: process**

All our processes are designed for the customer, starting with understanding what they are trying to achieve, and designing systems and processes that meet their needs. The most simple transactions are carried out via self-service digital channels, and automated to remove manual input, wherever possible. More complex services are joined-up, and are flexible enough to meet the users' needs

**Our model for the future: finance**

We take a much more commercial approach to how services are delivered. The cost of customer contact is driven down significantly in the next three years, as increasingly services are accessed through digital channels and customers are enabled to self-serve. ICT systems are integrated, to enable more efficient automated workflows, and the full cost of providing services is better understood

**Our model for the future: technology**

The technology that underpins citizen & customer contact is robust, fit for purpose and accessible. We invest in online services to reduce the need for customers to contact the Council. All applications used are reliable and high quality, and mobile working solutions enable better resource management and optimum efficiency

**Our model for the future: information**

Information is a key asset for the Council, and is treated as such. It is recorded and stored in a structured way, facilitating better sharing, and better knowledge and insight about customers. Where information can be published, it is, ensuring the Council is as open and transparent as it can be, and enabling public use of data to improve community self-reliance

**Our model for the future: people**

The people working in the Council have the right attitude and values, and their skills are developed so they can help customers become more self-reliant. The whole organisation embraces this change of approach, and drives the shift to digital. The Organisational Development Strategy facilitates the development of a workforce and culture to enable the changes needed in the customer experience.

**Our model for the future: collaboration**

We work much more closely with colleagues in the organisation and with partners and contractors, to ensure we are delivering the best, most efficient service we can. In particular in relation to customers with the highest needs, we work closely across the Council and with voluntary sector partners to ensure our work is not duplicating effort, and is contributing to delivering the best possible outcomes.

## **Recommendations**

The following recommendations were agreed at Programme Board and endorsed at the Plan Phase Gateway Review.

1. Implementing the new customer experience (as described above)
2. Developing closer partnership working
3. Implementing the approach to Processes, Technology and Information
4. Better meeting the needs of high need Customers
5. Implementing the new model for Governance
6. Implementing service redesign across the Council
7. Implementing the new approach to communications
8. Embedding new roles and skills requirements
9. Investigating and agreeing future sourcing approach

### **Further details on each recommendation follow:**

#### **Recommendation 1 - Implementing the new customer experience**

To agree the new customer experience:

- 1 Citizen
- 2 Service
- 3 Communication
- 4 Process
- 5 Finance
- 6 Technology
- 7 Information
- 8 People
- 9 Collaboration

#### **Recommendation 2 – Developing closer partnership working**

- 1 Develop Volunteering/Active Citizen Policy plus Council Wide volunteer handbook, policies and procedures
- 2 Develop communications strategy for volunteering
- 3 Ensure links to Organisational Development strategy are explicit
- 4 Links to be developed further with; Bracknell Forest Homes, Parish and Town Councils, Involve, statutory services e.g. police and health, commercial partners

What this will look like for citizens:

- The VCS and the Council work more closely with each other, acknowledging strengths where they already exist and not duplicating what is already there
- The Council promotes VCS services, both internally, across different Council services and externally.
- We are working with the VCS as we redesign our services and review how we work together to ensure that we value the contribution the sector makes to tackle complex community issues

## **Recommendation 3 – Implementing the approach to Processes, Technology and Information**

### **Telephony**

- 1 Ensure visibility in all high volume call areas by designing a routing system to manage calls effectively, through the Liberty system
- 2 Shift channels to online by increasing waiting times and tailoring in-queue messages for some services, ensuring those in need are dealt with quickly
- 3 Calls to be routed to appropriately trained staff, based on need.
- 4 Improve visibility (better use of telephony data)

What this will look like for customers

- Vulnerable or high need customers are able to speak to an appropriate member of staff quickly and easily
- Other customers experience longer call queuing times and are encouraged to complete routine transactions on line
- Customers are able to complete routine transactions or access information online without the need to call

### **Post**

- 1 Review the post function cost overall in light of these changes and bring cost in line with other comparable LA's
- 2 Be more digital in internal and external post – investigate Digital post room
- 3 Reduce by one van and courier and rationalise service in short term and review requirements in the longer term
- 4 Use GovDelivery to communicate to specific groups of customers rather than hardcopy mailshots
- 5 Use online accounts, e.g. council tax e-billing to facilitate shift to online

### **Face to face**

- 1 Change Time Square customer service desks to a self-serve model
- 2 Change welfare and housing desks to an appointment based service

What this will look like for customers:

- Better signposting and use of technology is allowing ease of channel shift to online methods
- Customers make an appointment when they choose to have face to face contact e.g. housing and benefits
- When visiting Time Square customers are able to access self-serve and are encouraged to channel shift online by assistance from customer service staff
- Visitors to Time Square use a digital platform to book in for meetings and appointments.
- Customers use technology for documentation checking, scanning etc.
- Customers use digital channels to advise of change of circumstances notifications and make new applications

### **Payments**

- 1 Staff to promote cost effective payment channels

- 2 Ensure that online is the default payment method for all services
- 3 Change the cheque processing to online payments by looking at whole business processes across all services
- 4 Investigate which other services could use online payment accounts
- 5 Invest in technology where it would assist in online payments and ensure they are utilized

### **Emails**

- 1 Principles and Guidance should be given for drop box and email use to ensure that drop box use is effective and encourages consistent, timely responses
- 2 A coordinated approach to use of drop boxes across all areas of the Council
- 3 Some drop boxes should be consolidated or deleted
- 4 Use of structured enquiry form to be promoted

### **Technology**

- 1 Undertake analysis of the customer journey, the end-to-end process, and the opportunities for digital technology to facilitate it.
- 2 Prioritise the areas to redesign digital customer journey on the basis of transaction volumes, savings, level of impact, and improvement in overall citizen satisfaction with the council.
- 3 Ensure links to ICT and Digital Strategy and Customer Contact Strategy are explicit

### **Information**

- 1 Embed an integrated approach to channel performance management. This is essential and key to all outcomes.
- 2 Investigate and establish a set of key indicators that can be used across a wide range of functions and at differing levels

## **Recommendation 4 - Better meeting the needs of high need Customers**

Undertake further in depth analysis across the Council to understand the demand that customers make on statutory and voluntary services. The purpose of the casework will be to identify:-

- 1 where failure demand occurs so that it can be designed out;
- 2 where duplication of services and resources can be rationalised across voluntary and statutory sectors;
- 3 opportunities to support staff to provide services in a coordinated way
- 4 system conditions that stand in the way of achieving better services for customers so that they can be challenged and removed
- 5 where we can deliver more coordinated casework across statutory services
- 6 measures for services so that customer needs are best met and they are helped to achieve independence and thus avoid service cost for statutory services
- 7 ways in which voluntary and third sector organisations can support the redesigned services

What this will look like for customers

- Vulnerable customers receive an effective service from the Council and needs are met

### **Recommendation 5 – Implementing the new model for Governance**

1. Develop role description of Chief Officer Customer Services to include responsibility for cross Council Customer Experience model
2. Develop role of Citizen and Customer Contact Programme Team to support implementation of review recommendations and ongoing development of the Customer Experience Blueprint

### **Recommendation 6 - Implementing service redesign across the Council**

1. To agree to rollout the methodology across all service areas, with areas of highest cost and customer contact being prioritised.

What this will look like for customers

- Customers contacting the Council receive a consistent and cost effective service, for whatever reason they are contacting us.
- Customers are confident using online methods of access, which are easy and simple.
- Those customers with complex needs, for example social care, are supported effectively.

### **Recommendation 7 - Implementing the new approach to communications**

Embed audience development and message development by:-

- 1 Create systems for multi-user access to the main council social media accounts, supported by notification systems and simple guidance and protocols, to rapidly increase social media response rates.
- 2 Develop a programme of 'soft marketing' content creation, drawing on the knowledge, interests and creativity of council officers, partners and residents.
- 3 Pilot the creation of targeted WhatsApp groups across specific groups of residents, including library service users.
- 4 Continue to deliver and evaluate the use of paid for targeted social media marketing campaigns via Facebook.
- 5 Make the roll out of GovDelivery across the council a priority, with key council ambitions (such as digital service provision, self-care, etc.) set as default options.
- 6 Disseminate the Behaviour Change communications Toolkit and pilot its use with selected teams in the delivery of promotional campaigns.
- 7 All internal communications lead staff to undertake e-learning sessions
- 8 Create an 'open source' system whereby staff members across the Council and its partners (as well as residents) are encouraged to create and contribute photo and video content to the library.

What this will mean for customers

- Customers understand how the Council is engaging with residents
- customers feel empowered to do more for themselves

### **Recommendation 8 - Embedding new roles and skills requirements**

1. Develop a means of auditing the skills of the workforce, and carry out a skills audit.
2. Review job descriptions and person specifications of all staff who have dealings with customers to reflect the principles of the new blueprint.
3. Develop a learning and development programme to address the skills gaps identified.
4. Ensure the culture change plan in the Workforce and Organisational Development Strategy is in line with the Customer Contact strategy

### **Recommendation 9 - Investigating and agreeing future sourcing approach**

1. Work to restructure and transform customer contact internally will be the focus of the first two years whilst seeking potential partners for collaboration and sharing.
2. Some elements of customer contact will be on separate trajectories – Forest Care will seek to operate as a traded service and Adult Social Care will work towards greater integration with Health Services over the next three years.
3. Increased use of volunteers will be developed in partnership with Involve.
4. The agreed principles for collaboration will underpin the Strategy.
5. Services identified for sharing will need to begin discussions in year 2.

### **Financial Appraisal**

Each project within each of the work streams will have a simple cost/benefit analysis at the initiation stage, to ensure financial justification for proceeding. Some cost savings may be realised directly, as a consequence of work being completed, e.g. changes to the post system, and cheque payments. However, the Citizen and Customer Contact Programme of work mainly acts as an enabler to cost savings in other services. This Programme will ensure that any savings realised are not double counted.

### **Implementation Approach**

Each work stream will be led by a member of the Programme Team, and will have a number of projects to be delivered over the lifetime of the programme. Some projects for year one are already underway, and further opportunities will be identified during the first year of the programme. Projects will be managed using the appropriate project management methodology (Prince 2, Agile, etc.) and project initiation will be approved by the Programme Team. This team will also oversee the progress of these projects, by reviewing Highlight and Exception Reports, and Project Closure Reports at the end of each project.