

**TO: EXECUTIVE
23 SEPTEMBER 2014**

**CUSTOMER CONTACT STRATEGY 2011-2014
Director of Corporate Services**

1 PURPOSE OF REPORT

- 1.1 To provide the Executive with an update on progress with the Customer Contact Strategy and the Channel Strategy, and to seek to extend the strategies for a further year.

2 RECOMMENDATION(S)

- 2.1 That the Executive notes the report and progress made on the Customer Contact Strategy and Channel Strategy to date.
- 2.2 That the Executive supports the extension of the current Customer Contact Strategy and the Channel Strategy into 2015.
- 2.3 That the Executive supports the development of a new Customer Contact and Channel Strategy, and a Digital Strategy, to establish the direction of travel for the Council beyond 2015.

3 REASONS FOR RECOMMENDATION(S)

- 3.1 Good progress has been achieved in the delivery of the Customer Contact and Channel Strategies, and it is still relevant in the current climate. The investigations into a number of potential channel developments have resulted in further work being required to deliver the benefits offered by these channels, and this work will take place over the coming year.
- 3.2 In addition, developments in the digital world since the original strategy was written now give us an opportunity to rethink how we enable customers to interact with the Council. To establish the right strategy for the future requires some considerable research and consultation with Elected Members as well as with Officers across the Council, therefore the development of the new strategy should take place through 2014-2015.

4 ALTERNATIVE OPTIONS CONSIDERED

- 4.1 Significant progress has been made through the existing strategy, and the Council could leave it in place as it is. However this is likely to miss opportunities that arise from developments in the digital world and new systems / technologies.
- 4.2 A new strategy could be developed more quickly, to come into effect in 2014. However, the current one is still relevant, with a number of actions arising from the current strategy still being delivered. In addition, a new Council elected in 2015 might want to review its Customer Contact Strategy, therefore a strategy adopted now could require significant re-work.

5 SUPPORTING INFORMATION

5.1 Background

The Customer Contact Strategy was adopted in 2011, and describes the Council's approach to dealing with customer contact. A key recommendation of the Strategy was the creation of a Channel Strategy. This was developed and an Action Plan combining all actions from both strategies was adopted, covering the following areas:

- Avoidable contact
- Channel shift
- Digital inclusion
- Accessibility
- Telephony
- New media
- Face to face
- Post and paper communication
- Payments

5.2 A report was presented to the Executive in October 2013 detailing the actions completed in Phase One of the strategies. A delivery plan for Phase Two was agreed at that time.

5.3 Excellent progress has been made on the actions agreed in the Phase Two plan, and a copy of the plan, with progress updates, is published on the Customer Services pages of the intranet. Highlights of progress include the following:

- a) Significant progress has been made with moving the website into an open source content management system. A number of microsites have been developed in Drupal, including the Adults' and Children's Safeguarding Boards sites, the new Youth Service website – Xpresionz, and the JSNA. These websites are totally responsive to the device you are using, and do not require a separate site to be built for mobile devices. The new content management system also provides new functionality. As we have developed these sites we have adopted a new way of working, using 'Agile' management techniques to enable rapid development and deployment.
- b) We have successfully moved all customer facing services to Time Square, relocating the Registration Service and the Revenues Service, to work alongside the Customer Services and Housing and Benefits Services. The refurbished accommodation and improved queue management arrangements are providing a significantly better experience for customers. In particular, feedback from Registration Service customers has been very positive about the calmer environment. The Revenues Team has found it helpful to be located with the Benefits Team when dealing with customers, as they are both able to provide a much more complete service. In addition the telephone

contact centre is also now located at Time Square, enabling the Customer Services team to work much more flexibly.

- c) We have procured a replacement CRM system, using the G-cloud framework. This has been the first instance of the Council purchasing software through this framework. The implementation of this system has begun recently, and it will help us to deliver many of the actions agreed in the Customer Contact Strategy, in particular to accelerate the work already underway on shifting customer access to more digital channels. This was not possible with the incumbent system, without significant financial investment in a major upgrade. The new system will have lower annual costs than the current system, and has been purchased through an Invest to Save bid.
- d) We have implemented the automated telephony service, both internally and externally. This enables a caller to state the name of the person or department they wish to speak with, and be transferred automatically, without needing the involvement of a Customer Services Advisor. This system is currently managing approximately 25% of the calls coming into Customer Services, and as a result of this and the co-location of the team at Time Square, we have been able to reduce the size of the team. This channel shift has helped to deliver a reduction in staffing in the Customer Services Operations team, and this resource is being reallocated to support development in Digital Services.
- e) We have continued to work actively on a digital inclusion project, working closely with the Open Learning Centre and Age Concern to develop additional opportunities to try out technology and the internet, and new learning opportunities, to further develop digital skills.
- f) A new platform for the Open Data website has been secured from CIPFA at no cost, and has been implemented. This provides a much better way of presenting the data.
- g) An upgrade to the Library management system has been implemented, resulting in improved online access for customers to the library catalogue and other functions.
- h) Substantial progress has been made with some services in respect of channel migration. In particular, school admissions saw the number of online applications for secondary school places increase from 22% last year to 65.9% this year, and for primary school places from 33.8% to 70.5%. In addition, approximately 50% of renewals for subscription to the brown bin service were done online. This shift to self-service supports the move of resources to further develop services available through online and digital channels.
- i) We have made progress with implementing Chip & Pin payment facilities at Customer Services in Time Square and in Registration Services, as well as for the Open Learning Centre and the Cemetery and Crematorium.
- j) The redesign of the Benefits and Housing services using Systems Thinking has resulted in a much more responsive service, delivering the maximum benefits the customer is entitled to, in the quickest possible time. Most cases now require only two interactions with the customer, where previously there may have been as many as thirty.

- k) The website has again retained its accessibility accreditation from the Shaw Trust. The latest report has highlighted some issues with the large volume of pdf documents on the site, which will be addressed over the coming months.
- l) A review of the Digital TV service and the Reporting App provided with it has been carried out. This concluded that the service was based on outdated technology, and had very low take-up. As a result the decision was taken to decommission the service, with an annual saving of £12,000. There has been no adverse feedback from customers about this service closing.

5.4 A number of investigations into possible development were carried out during Phase Two, and these have resulted in the following ongoing work:

- a) The consultant working on online bookings concluded that there is a substantial requirement for this from various services. It is unlikely that a single solution will be able to meet all of the requirements. It therefore seems likely that this development will require investment, and further analysis is being carried out with a view to preparing a bid for capital investment. Work will also be undertaken to establish whether there are any open source solutions, or Drupal modules that might deliver some of the requirements.
- b) The evaluation of Drupal, the open source Content Management System, was carried out during the implementation of the various microsites required during this year. This has concluded that it is the right solution for the Council, and over the coming year we will be working to transfer the main Council website to this environment.
- c) Discussions have been held across the Council to investigate the business case for implementing a subscription based email and SMS Alerts service. However, to date there has not been sufficient interest from services to justify the implementation of this new channel. The Social Media Working Group will continue to consider this as an option, and to develop a business case for this investment, if there is demand.

5.5 The end date for the current strategies is 2014, however, they are still sufficiently relevant, and there is sufficient work ongoing to justify their extension as they are, to 2015. To take these strategies forward a Phase Three Action Plan has been developed, and this is attached, at Appendix A. Key actions in Phase Three include:

- a) A further restructure of the Customer Services team will be undertaken to provide some additional resource in the Digital Services Team. It is hoped to add a Drupal designer and an additional technical resource to the team. This will be funded mainly by reductions in staffing elsewhere in Customer Services, along with income generated from hosting and support of microsites. We are currently working to identify some additional funding to enable additional posts to be created.
- b) Work will continue to migrate remaining websites to Drupal. This includes a number of additional microsites as well as the main website. This development will be carried out in parallel with the CRM implementation as far as possible, to ensure web content reflects the new transactional capabilities being introduced.
- c) Implementation of the new CRM is a key requirement to deliver many features of the Customer Contact Strategy. The implementation will focus on

enabling as much as possible to be delivered via self-service, using a mobile device, as this is increasingly the channel chosen by Bracknell Forest residents.

- d) As part of the CRM implementation, delivery of an online account for customers will be enabled. This will allow customers to maintain their own personal information, log enquiries and service requests, and track progress on these enquiries. The ambition is to link this 'front end' account to other accounts in line of business systems or customer portals, e.g. libraries, leisure, e+ card, etc., and to facilitate a 'single sign-on' experience for the customer.
- e) Service redesign is a key component of the CRM implementation, with a focus on designing a customer journey optimised for self-service via a mobile device, which should assist in delivering an increase in channel shift. In the first instance the landscaping and street cleansing services will be redesigned, looking at the complete service and as far as possible enabling it to be managed end to end through the CRM. This opportunity will also be explored as we redesign other services, and may enable cost savings to be made as use of third party applications is rationalised.
- f) Investigations are underway into an extension of the recycling rewards / incentive scheme, linking the CRM customer record to the e+ card record. We aim to reward people for creating an online account with the council, and may also extend the scheme to reward them when they carry out self-service online transactions.
- g) Following the consultant's report into the requirements for online bookings, further analysis will be carried out and possible solutions identified. It may then be necessary to bid for some additional funding to enable the preferred solutions to be implemented.
- h) The development of an All Services Hub will progress. This will replace the current Adult Social Care iHub and the Family Information Service online directory. It will also enable the publication of the Special Educational Needs Local Offer. In the longer term it is planned that other services will benefit from using this hub to publish information about events and services.

5.6 As part of Phase Three it is recommended that further investigations are carried out into the opportunities provided by new channels, or by making increased use of channels already in place. These include:

- a) A review of the implementation of the automated telephony service will be carried out to establish whether more services could be delivered using the same technology, for example it may be possible to automate reporting of a missed bin, which would reduce calls to the telephone contact centre.
- b) An investigation into the introduction of text messaging to enable updates on cases to be sent to customers will be undertaken. For example, customers could receive a text message when a problem they have reported has been resolved, such as fly tipping or graffiti.
- c) An assessment of the use of social media as an inbound customer access channel will be completed, with a view to identifying whether social media

comments should be routed into the telephone contact centre, where cases can be created to deal with the issues being raised, if appropriate.

- d) The introduction of instant messaging or web-chat will be considered. This would enable customers who are experiencing difficulties accessing services online to have an online conversation with a Customer Service Adviser, who can help them to find the information or access the service they are looking for. This can be particularly useful in ensuring customers remain using a digital channel and do not switch back to more traditional channels if they experience problems. It can also be very helpful in identifying the parts of our website that cause problems for customers.
- e) A review of 3rd Party applications and web content (in particular the use of pdf's) will be carried out, to improve accessibility, self-service and mobile performance of the website.

5.7 As these actions are delivered through 2014-2015, they will help to deliver the aspirations of the current Customer Contact and Channel Strategies. At the same time, work will begin to develop a new Customer Strategy, and a Digital Strategy for the Council. These will take account of developments in technology and changes in customers' behaviour. A new strategy will review the current strategy and establish a new direction, focused on delivering the best experience for customers whilst delivering maximum efficiencies.

6 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

6.1 Nothing to add to the report.

Borough Treasurer

6.2 There are no additional financial implications arising from this report.

Equalities Impact Assessment

6.3 EIA screenings are carried out for each new project as it is implemented.

Strategic Risk Management Issues

6.4

Other Officers

6.5

7 CONSULTATION

Principal Groups Consulted

7.1 Directors and Chief Officers

Method of Consultation

7.2 Presentation of report to DMTs and CMT

Representations Received

7.3 None

Background Papers

Customer Contact Strategy 2011-2014

Channel Strategy 2011-2014

Updated Action Plans, with progress reports

Report to Executive Committee 15 October 2013

Contact for further information

Bobby Mulheir, Corporate Services - 01344 352096

bobby.mulheir@bracknell-forest.gov.uk

Avoidable Contact Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
AC2 (CF)	Use telephone call, face to face and email data, and customer feedback, to identify areas of improvement within the council and work to eliminate waste, process failure and unnecessary cost to the customer or the Council.	December 2015	Chief Officer: Customer Services	Underway and on target	Implementation of the new CRM system will make analysis of channel activity easier, as access across all channels will be recorded in a single system. Customer feedback will be used alongside this data to identify process failures, and recommend improvements to the customer experience. We will work with existing suppliers to ensure we gain maximum benefits from the systems available, e.g. introducing new channels using the telephony management system.
AC3 (CF)	Implement a system of recording and investigating avoidable contact to identify areas and processes which could be improved for the benefit of the customer or the Council.	September 2015	Chief Officer: Customer Services	Not yet underway	Reporting facilities in the CRM system will be developed to facilitate better data analysis. We will categorise mediated customer interactions as avoidable or channel-shiftable, as appropriate, to ensure we maximise the opportunities for channel shift. This is a key element of prioritising services for redesign of part of the new CRM implementation
AC4	Introduce a change of address / change of circumstances process that enables the customer to notify the council once and updates as many services as possible.	March 2015	Chief Officer: Customer Services / Head of Democratic and Registration Services	Not yet underway	The new CRM system will enable the creation of a single process for notifying the Council of a change of address. It is planned that this will be managed by the customer, through their on-line account, and will link with key systems, including Revenues, e+ Cards and Electoral Registration.

Channel Shift Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
CS8 (CF)	Develop an online booking process for the removal of bulky waste.	September 2015	Chief Officer: Customer Services	Not yet underway	A consultant's report has been delivered, which helps to establish the council wide requirements and to analyse current provision at other councils. This is currently being reviewed to establish the best way forward. It is likely that a capital investment will be required to meet all the requirements.
CS9 (CF)	Develop an online booking process for the pest control.	September 2015	Chief Officer: Customer Services	Not yet underway	A consultant's report has been delivered, which helps to establish the council wide requirements and to analyse current provision at other councils. This is currently being reviewed to establish the best way forward. It is likely that a capital investment will be required to meet all the requirements.
CS10 (CF)	Implement an online booking process for repairs to council buildings - reactive maintenance.	September 2015	Chief Officer: Customer Services / Chief Officer: Property	Not yet underway	Currently investigating the workflow in e-forms and the capacity of the repairs and maintenance management system, to establish the best way of delivering on-line reporting to users. This will be included in the service redesign work undertaken for implementation of the new CRM system.
CS12 (CF)	Increase the number of online leisure bookings.	September 2015	Chief Officer: Leisure & Culture	Not yet underway	An online bookings project is underway, with consultants appointed to establish the council-wide requirements and to analyse current provision. The consultant has provided analysis of the current situation and requirements and this is currently being reviewed to establish the best way forward. In addition, an upgrade to the Leisure Management system may deliver improvements to the customer experience.
CS15	Introduce targeted promotion of website and other digital services, aimed at specific customer groups.	March 2015	Head of Comms and Marketing	Not yet underway	Data from Mosaic has been provided, which helps identify the best communication channels for the citizens of Bracknell Forest. This will be used to carry out a targeted promotion campaign to encourage customers to create an on-line account, and manage their interactions with the Council through this account.
CS16	Introduce customer registration to the website to facilitate on-line logging and tracking of service	September 2014	Chief Officer: Customer	Underway and on target	The new CRM system enables customers to create an on-line account, through which they can manage their transactions with the Council. This will be made live when the first phase of new

	requests.		Services		services through the CRM goes live in September.
CS17	Incentivise customers to register on-line and to transact with the council on-line.	September 2015	Chief Officer: Customer Services	Not yet underway	We aim to link the customer's on-line CRM account to the e+ account, enabling us to link the CRM to the rewards scheme. Customers will then be rewarded for creating an on-line account, and we will consider providing rewards each time they transact through the account, rather than by telephone or personal visit.
CS18	Introduce ability for customers to subscribe for online newsletters, notifications and alerts.	September 2015	Chief Officer: Customer Services	Not yet underway	This item has been picked up by the Social Media Working Group, who will work to establish the business case for use of subscription alerts across the council, and will investigate suitable providers.
CS19	Review all on-line forms with a view to simplifying processes for customers and improving efficiency of end to end processes for services.	September 2015	Chief Officer: Customer Services	Underway and on target	The replacement of the CRM system involves reviewing all existing processes end to end, to deliver efficiencies and ensure consistency across all channels. The first phase of this encompasses Landscaping and Street Cleansing services, which will be live by October 2014. A review of all services delivered via the current CRM will be completed by September 2015.
CS20	Improve on-line access to the Family Information Service and access to information for Adult Social Care	September 2015	Digital Services Manager	Underway and on target	A project to replace the iHub and Family Information Directory is underway, with a plan to deliver a single solution that meets the needs of both services, and enables much more functionality. The first phase of this should be live in 2014.

Digital Inclusion Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
D1 (CF)	Promote and encourage the use of key contact channels to all audiences, with particular focus on those groups accessing services less often.	December 2015)	Head of Comms and Marketing / All service area managers	Underway and on target	Data from Mosaic has been provided, which helps identify the best communication channels for the citizens of Bracknell Forest. This will be used to carry out a targeted promotion campaign to encourage customers to learn how to use the internet, and ultimately to create an on-line account with the Council.
D8	Introduce an 'Assisted Digital Strategy' to support digitally excluded customers in accessing digital services	September 2015	Chief Officer: Customer Services	Not yet underway	A council wide 'Digital Strategy' is currently in development, and will include Assisted Digital. A draft of this strategy will be in place by September 2015.
D9	Develop the Digital Inclusion project, working with partners to deliver a comprehensive range of digital inclusion activities targeted at all digitally excluded customers.	December 2015	Chief Officer: Customer Services	Underway and on target	This task will be ongoing. A multi-agency group has been established through the Older People's Partnership Board to lead on Digital Inclusion. This is supported by an internal operational group of the Council, developing and delivering our digital inclusion offer.

Accessibility Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
A7	Maintain accessibility accreditation during transition of website to new content management system.	December 2015	Digital Services Manager	Not yet underway	Accessibility accreditation to be retained for the main website, throughout its redevelopment and the move to open source.
A8	Develop use of inbound text messaging to access services for hearing impaired customers	December 2015	Chief Officer: Customer Services	Not yet underway	This will be included as part of phase two of the new CRM implementation.
A9	Develop use of live web-chat facilities as an alternative to telephone, post and email channels.	December 2015	Chief Officer: Customer Services	Not yet underway	To be included as part of phase two of the new CRM implementation.

Digital Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
W8	Replace current Content Management System with open source alternative.	December 2015	Digital Services Manager	Underway and on target	JSNA website now live, and has been developed in Drupal. The new Youth Service site is expected to go live in the next quarter. Further work is underway with other microsites, to migrate them to Drupal, before starting work on the main website.
W9	Ensure web infrastructure provides adequate resilience and 24/7 availability.	December 2015	Digital Services Manager	Underway and on target	Drupal hosting arrangements will provide improved resilience.
W11	Review map functionality on public website.	December 2015	Digital Services Manager	Not yet underway	The usability of the existing mapping system for customers is limited. As part of the migration to a new CMS, and to ensure compatibility with the new CRM, we will evaluate possible alternatives. This will be a key component of the new CRM implementation.
W15	Develop a Corporate Digital Strategy	September 2015	Chief Officer: Customer Services / Chief Officer: ICT	Underway and on target	An outline strategy has been drafted. Further work is underway to research strategies in other authorities and government bodies.
W16	Restructure to increase capacity in Digital Services team	March 2015	Chief Officer: Customer Services	Underway and on target	Job descriptions have been drafted and work is underway to establish budget source for the additional capacity required.

Telephony Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
T7	Review existing services delivered via telephone channel to improve efficiency and migrate, where possible, to digital channels.	December 2015	Chief Officer: Customer Services	Underway and on target	This is a key component of the CRM replacement project. All existing services are subject to an end to end review, to ensure consistency across all channels and identify opportunities for process improvements and efficiencies.
T8	Review implementation of auto operator. Identify other services that could make use of voice recognition technology.	December 2015	Customer Services Manager	Not yet underway	The delay in implementing auto-operator has meant we need to delay the start of this action.
T9	Investigate multi-channel blending, to maximise efficiency of operation in the call centre.	December 2015	Customer Services Manager	Not yet underway	This will be investigated in Phase Three of the implementation of the CRM system.

New Media Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
NM8	Ensure Social Media becomes embedded in the council as a key channel for engagement, customer access and two-way communication.	September 2015	Chief Officer: Customer Services	Underway and on target	Social Media Implementation Group established. A Social Media protocol has been agreed and published. Evaluation of effectiveness of use of Social Media underway.
NM9	Implement use of outbound text messages and email messages to provide information and updates to customers	December 2015	Chief Officer: Customer Services	Not yet underway	Alerts project is being picked up by the Social Media Working Group. Text messaging is included as a key channel for development as part of the CRM implementation project.
NM11	Ensure QR codes included on all new literature and signage, providing links to the 'Report It' or other	June 2015 (ongoing)	Head of Comms & Marketing	Underway and on target	QR codes to be included on future Council Tax and Business Rates bills, enabling customers to link directly to the online payment facility.

appropriate pages on our website				Further uses of QR codes being investigated.
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Face to Face Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
F3 (CF)	Implement online Benefit Services and make access available at the primary reception at Time Square north.	September 2015	Chief Officer: Housing / Chief Officer: Customer Services	Not yet underway	Implementation of E-bens on line claims and change of circumstances is delayed due to the IT supplier not being able to provide integration between products. ICT are chasing the supplier and have contacted other LA who have developed work-arounds to address this problem. It is not possible to provide a go live date until there is better understanding of the ICT issues.
F6	Review processes for Face to Face interactions with customers to ensure maximum efficiency and consistency with other channels	December 2015	Chief Officer: Customer Services	Not yet underway	This is a key component of the CRM replacement project.

Email Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
E2 (CF)	Analyse the data for the use of online forms and determine which contacts could be shifted to online self-service.	March 2015	Chief Officer: Customer Services	Underway and on target	This information informs the CRM implementation project, and feeds into the end to end redesign of all processes going through Customer Services and the website.

Payment Strategy

Ref.	Action	Delivery Date	Responsible Officer	Current status	Progress update at July 2014
P3	Continue to review payment channels available to customers, and encourage migration to more cost effective channels.	September 2015	Chief Officer: Customer Services	Underway and on target	We continue to encourage take-up of direct debit where possible for services, and are aiming to introduce more date options for customers. We continue to work with system supplier to improve appearance and usability of on-line payment facilities.
P4	Implement new payment channels where appropriate and migrate additional services to existing electronic payment channels.	March 2015	Chief Officer: Customer Services	Underway and on target	Chip and pin to be implemented at Time Square, Open Learning Centre and in Registrars service. This has been delayed due to PSN requirements. Additional services to be added to telephone payment line to be identified.

Code: (CF) = carried forward from Phase Two

Colours:
 Blue = completed
 Green = underway and on target to deliver by due date
 Yellow = underway but not on target to deliver by due date
 Red = unlikely to be achieved
 White = not yet underway