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# CARLISLE CITY COUNCIL

# OVERVIEW AND SCRUTINY MANAGEMENT COMMITTEE

## Committee Report

Public

Date of Meeting:    7 November 2002

Title:    Best Value Review – Customer Contact

Report of:    City Treasurer

Report reference:

Summary:

The final report of the Best Value Review on Customer Contact has been presented to the Resources Overview and Scrutiny Committee. This Committee are asked to confirm that the final report of the review team fulfils the original scope.

Recommendations:

The Overview and Scrutiny Management Committee are asked to confirm that the brief and scope originally set by Members for the Customer Contact Best Value Review has been satisfied.

Contact Officer:    J. Nutley    Ext:    X7250

# CITY OF CARLISLE

To: The Chairman and Members of the
Overview & Scrutiny Management Committee
07 November 2002

Financial Memo
2002/03 No 75

## CUSTOMER CONTACT BEST VALUE REVIEW – FINAL REPORT

1. The Best Value Scoping Panel set the terms of reference for the Customer Contact Best Value Review on the 10$^{th}$. September 2001. The minutes of that meeting are presented in Appendix A.

2. The final report of the Customer Contact Best Value Review was presented to the Corporate Resources Overview and Scrutiny on 5$^{th}$ September 2002. It is presented in Appendix B.

3. This Committee is asked to confirm that the report presented in Appendix B meets the overall requirements set out by the scoping panel in Appendix A and that the report should now be forwarded to the Executive for consideration.

D THOMAS
City Treasurer

Contact Officer: John Nutley          Ext: 7250

City Treasury,
Carlisle
29 October 2002

# Appendix A

BEST VALUE SCOPING PANEL

MONDAY, 10 SEPTEMBER 2001 AT 2.00 PM

PRESENT:   Councillor Bloxham (Chairman); Councillors L Fisher, Guest, Knapton and Styth.

## BVSP.11/01  APOLOGIES FOR ABSENCE

Apologies for absence were submitted on behalf of Councillors Bradley, Jefferson and E Mallinson.

## BVSP.12/01  CUSTOMER CONTACT BEST VALUE REVIEW

The Head of IT, as Lead Officer for this Review, presented the City Treasurer's Financial Memo 2001/02 No 82 which invited the Scoping Panel's input into how the City Council's Customer Contact Best Value Review should be conducted.

He provided Members with the background to this Review and set out the following suggested list of objectives:-

(i)     To provide a framework for the current and future provision of customer contact and care within the Authority.

(ii)    To conduct a Review which is customer focused.

(iii)   To ensure any resulting changes in customer contact will result in customer satisfaction moving into the upper quartile.

(iv)   To ensure any resulting changes in customer contact will result in the Council fulfilling the requirement to comply with BBI157 (% of interactions with the public which are capable of electronic service delivery) moving towards 100% by 2005.

(v)    To result in a more effective and efficient regime of customer contact which will deliver to clients a high quality and easy to access interface to Council services which meet their needs.

(vi)   To result in a regime more closely related to a client's needs such as life event driven rather than related to the Council's organisation.

(vii)  To result in a higher overall level of customer care than that which is currently enjoyed.

(viii) To produce a more resource efficient customer contact service.

In agreeing the above objectives, Members also considered that the Review should address issues relevant to Carlisle citizens who access City Council services to ensure that the City Council was getting the basics right with regard to customer contact issues. In addition, issues relating to people from outside Carlisle wishing to access information regarding Carlisle, eg through the Council's website should also be addressed.

With regard to the scope of the Review it was agreed that attention should be given to ensuring customer service standards were consistent throughout the Authority and not left to each individual Department to determine separately. It was considered that the type of services provided at the Reception Desks at The Sands and The Pools would generally lead to a good level of customer satisfaction. It was considered that customer contact for statutory services was generally of a lower standard and had most improvement to make.

It was also considered that internal processes for Council Departments to access services should be no more favourable than those applying to a member of the public.

The City Treasurer's suggestions with regard to composition of the Review Team was agreed as follows:-

(1)    Any service with a significant customer contact element already in place.

(2)    Representative Members from any significant, though not all, services selected for review.

(3)    An Officer from the Communications Unit.

(4)    An Officer from the Policy Unit with particular responsibility for performance measurement.

(5)     An ICT Officer.

(6)     Best Value Officer.

(7)     An administrative resource.

(8)     External Member recruited for their experience in customer contact.

Members suggested that a representative from one of the Colleges in Carlisle or Marks and Spencer could be the External Member recruited for their experience in customer contact.

With regard to the depth of the Review, It was noted that 80% of enquiries made to the City Council were repetitive in nature and that it was the remaining 20% which needed to be particularly addressed. Members considered that the Review should concentrate on improving the number of queries which could be answered by the first point of contact. Where a member of staff passed on a query to a second person, that second person should be able to deal with the enquiry. Consideration should also be given to providing alternatives to people whose query resulted in a negative answer being given.

With regard to including external agencies in the Review, Members felt that this area should not be investigated, save for ensuring that staff would be able to transfer callers to the appropriate person in another Authority when needed.

With regard to external consultants, Members considered that the local Universities and Colleges should be approached to ascertain whether they would be interested in undertaking consultancy work on behalf of the City Council in respect of this Review.

(The meeting ended at 3.05 pm)

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# Appendix B
# FINAL REPORT

## *Customer Contact Best Value Review*

<u>Final Report</u>

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## Introduction

This report presents the work of the best value review on customer contact within the Authority. Commissioned as one of the Council's first thematic reviews, this review was given the brief of examining all aspects of customer contact within the Council.

The scope of the review was:-

(i)     To provide a framework for the current and future provision of customer contact and care within the Authority.

(ii)    To conduct a review that is customer focused.

(iii)   To ensure any resulting changes in customer contact will result in customer satisfaction moving into the upper quartile.

(iv)    To ensure any resulting changes in customer contact will result in the Council fulfilling the requirement to comply with BVI157 (% of interactions with the public which are capable of electronic service delivery) moving towards 100% by 2005.

(v)     To result in a more effective and efficient regime of customer contact that will deliver to clients a high quality and easy to access interface to Council services that meet their needs.

(vi)    To result in a regime more closely related to a client's needs such as life event driven rather than related to the Council's organisation.

(vii)   To result in a higher overall level of customer care than that which is currently enjoyed.
(viii)  To produce a more resource efficient customer contact service.

**The report details its findings, makes recommendations and then goes on to suggest a new customer contact model that will meet the requirements laid out by the scoping panel. In addition an Action Plan is produced to achieve these changes and a new corporate customer contact policy for the Authority is presented.**

The evidence supporting the findings of the review has been electronically collated and is available separately in an electronic form.

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# FINAL REPORT

## Key Findings

The review team consulted extensively about the current customer contact service. The following points represent the general state of the service.

1) Whilst there are some examples of good practice, in general the Council's customer service is being delivered in an uncoordinated manner, to different levels and standards.

2) There is no one officer or section charged with the overall management and delivery of customer service, which leads to duplication and disparity in the service.

3) There is no standard customer care policy operating within the Authority.

4) A customer care culture does not exist within the Council.

5) The customer service is very much structured on the internal organisation of the Council, which can make it difficult and confusing for customers to find the service they want.

6) Customer service standards are different for different services.

7) Key management information about the overall service is not being collected. Data on costs, customers' needs and requirements are only being addressed on a service-by-service level.

8) The main telephone switchboard acts as the central telephone contact point for customers, a function for which it hasn't been designed.

9) Training in customer services is available but is unevenly applied and very rarely beyond the level of receptionist.

10) The use of modern electronic systems to manage the customer relationship is practically non existent and is certainly not deployed in an integrated corporate manner.

11) In general, no service improvement plans directly aimed at customer service exist.

12) The use of the internet for service delivery is at a nascent stage, with the Council falling behind others in this area. Where it is being utilised, its use is characterised by a silo – or non corporate approach – probably borne out of frustration at the lack of progress at the centre.

13) As currently constituted it will be difficult for the Council to present their services in a joined up manner, which is a fundamental requirement of the Government's 2005 e-government target.

14) Consultation, development and delivery of customer service take place on a service-by-service basis.

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15) There is a lack of recognition of customer contact as a separate discipline. Managers and staff tend to accommodate this particular function as an extension of their normal duties rather than as a separate role.

16) There is no ownership at the senior management level on the subject of customer contact.

17) Performance is not being measured in a consistent manner – a necessary pre-requisite to improving any service.

18) No evidence has been found of any meaningful external partnership working in the area of Customer Contact.

19) Despite the limitations of the organisation of customer service within the Authority, there a strong evidence of the willingness of staff and management at all levels to provide a high level of customer service even whilst hampered by the current framework through which it is currently delivered.

20) In overall terms, whilst there are failings in the service and improvements that could be made, the service does tend to deliver at a basic level.

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**Key Recommendations**

To address the findings detailed above, the following improvements are recommended for implementation.

1)   That a separate unit be created to deal exclusively with all aspects of customer contact within the Authority, particularly performance, presentation, costs and delivery.

2)   That the customer contact model detailed in Appendix A be used as the basis for this.

3)   That the resources for setting up this unit be found by transferring them from existing business units.

4)   That this unit manages the service via service level agreements with other units - and manages and operates a service improvement plan on behalf of the Authority.

5)   That this unit standardises the customer contact service across all services.

6)   That a central contact point be created and promoted for customer service requests and that all other contact points be channelled through this central point.

7)   That a council wide customer care culture be introduced.

8)   That senior management take ownership of customer contact by requiring the customer services manager to be consulted on any new initiatives and requiring s/he report quarterly to their management team.

9)   That information systems be procured to handle and deal with customer contact on a corporate basis.

10)  That the customer care unit works with service departments and the Communications Unit to develop the concept of electronic service delivery.

11)  That the customer contact policy detailed in Appendix B be adopted for general use throughout the Council.

12)  That mutual delivery of services takes place, after agreement with partners, via the concept of Partner Access Channels (PAC) that is detailed elsewhere in this report.

10.

13) That an out of hour's service be developed and delivered by an external provider selected through the normal tendering process.

14) Whilst the planning and delivery of the recommendations are being carried out, that the Customer Service Manager assumes immediate control of all aspects of the current customer contact service.

15) That these recommendations apply to all Council Services with the following variations:-

    i. Leisuretime - that the Customer Relations Method Statement accepted as part of the bid from CLL be implemented as the method of ensuring good customer contact within the services and that, where appropriate, ways of co-operating with other parts of the Council to ensure best practice in customer care be developed.

    ii. Housing – be exempted due to LSVT and be noted that Carlisle Housing Association will vacate the Civic Centre within fifteen months but that they be invited to participate in the Partner Access Channel programme.

    iii. Carlisle Works – their service desk continue in operation but be subject to a number of restrictions approved by the Overview and Scrutiny Committee. Recommendation 12 should form part of their service.

    iv. Tullie House – be exempted but to be involved, and be a senior partner, in the development of the Partner Access Channel concept. Recommendation 12 should form part of their service.

    v. Tourist Information Centres – be exempted but to be involved, and be a senior partner, in the development of the Partner Access Channel concept. Recommendation 12 should form part of their service.

    vi. The Enterprise Centre - be exempted as this service primarily addresses the business sector rather than the citizen - but be part of the Partner Access Channel. Recommendation 12 should form part of their service.

    vii. The Brampton Business and Telecentre - be exempted pending further discussions with the Centre Manager - but be part of the Partner access Channel. Recommendation 12 should form part of their service.

    viii. The out of hours emergency response facility be managed by the Customer Services Team.

    ix. The possibility of running the Shopmobility service from, and integrated with, the Customer Contact Centre should be investigated.

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## Organisation Implications

There are five main organisational implications arising from the recommendations:-

1) The interim solution

This comprises of the Customer Services Manager, after agreement of the Unit Managers about working arrangements, assuming responsibility for all existing reception services and customer contact points prior to the implementation of the review's recommendations. This would result in elements of Departments and Units service being controlled and delivered by someone outside of their control. It would also mean members of their staff would be directed by someone who is not their line manager. These day-to-day issues are surmountable but it is a new method of working for the Council. There are significant advantages to this recommendation though:-

a) It helps the Customer Service Manager understand the business and leads to a smoother transition when the final recommendations are implemented

b) It helps staff understand their changing role against a background of which they're familiar

c) This method and style of working is likely to become more common in other areas as traditional barriers are broken down as the implications of the Council's organisational review are felt i.e. everyone to work as part of the Council rather than for a Unit or Department.

2) The creation of a new unit within the Authority

These recommendations will result in the creation of a new unit of significant size within the Authority. The unit will, using the current estimates, comprise of some 16 staff, rising to 25 if council tax and benefits are included. With cashiers the number rises to 32.

Elements of the unit will be formed by staff transferred to the Customer and Information Services unit as part of the organisational review. However, the balance of the unit will be staffed with posts transferred from other business units that have a large degree of exposure to customer contact. Some 12 staff will need to be transferred from these other business units. Depending on the underlying nature of their business the managers of each of the new twelve business units will need to transfer between 0 to 3 staff.

On the basis:-
1. the Customer Contact Centre will be performing some back office functions
2. the organisational review has consolidated units which should produce some efficiencies

12.

it should be possible to find the staff resource to transfer to the new Customer Contact Centre

To a large extent, the implications arising here are anticipated and allowed for within the current organisational review. What will be needed is delicate negotiation between the service manager, customer service manager and staff concerned to ensure a smooth transition to the new structure.

### 3) The creation of a central contact point for all service enquiries

The recommendations will result in all initial enquiries to the Council being routed through one single point of contact in the future. This will be a major cultural change for service departments who value their direct link with customers and feel that direct link is inherent to good service delivery. Service departments need to understand that these proposals don't prevent access to customers but manages the contact process on their behalf. However, to be clear, for this proposal to work it must be understood that all initial contact with the customer will be through the new customer contact unit. One implication of this is that all contact details for Carlisle services will be those of the new Contact Centre.

### 4) Service delivery moving from service departments to the new unit

Currently all services are delivered by the Departments directly responsible for that service. Under the new scheme Departments would have to let another unit deal with those transactions which are routine in nature and have predictable outcomes. This will require a major cultural change for service departments within the Authority who may perceive this change as a loss of control over some part of their service. However, it should be viewed as an opportunity for improving their service with this as way of releasing staff to concentrate on their core business and the non-routine (and perhaps more interesting?) aspects of the service. In many cases this degree of change will mean the customer contact staff will form part of departmental business processes even to the extent of accessing and updating information systems.

### 5) Partnership Access Channels
The recommendations will lead to the creation of a new concept called partner access channels (PAC's). Following agreement, this is a mechanism to be put in place where the Council will be in a position to provide information about, and in some advanced partnerships, deliver services on behalf of partners. The organisational implication arising from this is that partners who are part of the scheme will, in turn, be placed in a position to deliver services on behalf of the Council.

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## Cost and budget implications

The costs of implementing the recommendations outlined above may be broken down into four elements:- staff, building, IT and Supplies and needs to be split into capital and revenue costs. The budget implication will arise when the nett figures are considered. To arrive at the budget figures a detailed analysis of transactions for the current services has been carried out. However, whilst confident of the figures shown, these must still be considered provisional and subject to confirmation

### 1) Staff

Considerable work has been undertaken to estimate the resources required to deal with the number of transactions likely to be routed through the a new customer contact centre. It is estimated that 16 staff would be required to run a centre that did not deal with Council Tax and Benefits, at a total cost of £323k. But this would include the existing telephonist section and elements of the existing keeper section. Including the Benefits and Council Tax service would increase this number to 25 staff at a cost of £488k. Relocating other staff or parts of their posts, from existing units would find a large proportion of these costs.

The net cost to the Authority would depend on how successful this transfer is and would be the subject to delicate negotiations between the existing managers and the new customer services manager. The process has already commenced with a view to confirming figures but it is safe to assume that there will be some shortfall in staff transfer and for budget purposes it is assumed that three posts would need to be created at a cost of £60k. This figure could rise or fall depending upon the successful outcome of negotiations with unit managers.

For the purposes of Benefits and Council Tax, it is assumed that these sections are adequately staffed and if they transfer to the new unit there would be no impact on the net figures quoted

### 2) Building

Based on the assumption that the customer centre would be located in the Civic Centre, the Building Manager has produced very rough estimates of the costs needed for re-modelling and fitting out the foyer area. If these particular proposals were accepted, then for budget purposes a capital sum of £660k would be required. This is a reduction on the first estimates and has come about by deleting the recommendation that staff and deliveries should use the Lowther Street entrance.

A formal fully costed proposal for the Customer Contact Centre has been commissioned but this will take two months to complete. It is though that the final figure will be lower than that shown.

A notional £10k revenue cost would need to be set aside as a Repair and Renewal contribution towards replacing what will become a showcase for the Councils' services.

14.

3) IT

A large part of the work of the customer centre will be underpinned by technology and information systems. Many of these are details are contained in the Council's IEG statement. The capital costs for this, including hardware, will total in excess of £120,000 but will be funded entirely from IEG monies.

There will be a revenue budget required to deal with the on-going costs of the IT investment – typically 15% - or £18k p.a.

4) Supplies & Services

There will be costs in providing equipment and supplies to the new unit and costs associated with the running of the unit. These are typically grouped together under the general heading "Supplies and Services". Start-up costs should be set at £60k with an annual revenue cost estimated at £30,000. It may be possible to transfer some of these costs from existing budget holder when staff transfer ("staff dowries") but these are only likely to be nominal amounts – allow 15k.

The following table summarises the information detailed above:-

|  | Capital | Revenue (= Future Base budget) | Net Capital | Net Annual Revenue |
|---|---|---|---|---|
| Staff | 0k | 323k | 0k | 60k |
| Building | 825k | 10k | 825k | 10k |
| IT | 120k | 18k | 0k | 18k |
| Supplies & Services | 60k | 30k | 60k | 15k |

In summary, the total revenue budget for the new service unit would be £381k , with a capital sum of £660k needed to set the unit up. The net costs to the Council would require an increase in the revenue budget of £103k per year.

15.

## Action Plan

During the course of the review 5 key areas were identified which, if addressed, would improve the overall service.
These areas were:-

1) Environment

2) Ownership

3) Performance Management

4) Communication

5) Organisation
   - i)       Central point of contact
   - ii)      Silo working
   - iii)     Links to partner organisations
   - iv)     Corporate Approach
   - v)       Customer orientation
   - vi)      Customer Care Culture

Individual issues were identified in each of these areas and actions were identified to resolve and improve them. Appendix C-1 tabulates actions in each of these key areas. These run to a total of some 87 recommendations, each being assigned a target end date and lead unit to be responsible for taking the action forward.

Appendix C-2 lists the actions by date and forms the basis for the action plan. The actions fall into one of six general phases around which the review recommendations are centred: These are:-

     a) Set up the Customer Services Unit   -           Dec 02

     b) Commence Voice and Electronic Service –    Apr 03

     c) Arrange the out of hours service –            Jun 03

     d) Set up mail contact service –               Jul 03

     e) Commence face to face service -           Aug 03

     f) Initial partnership working     –           Jan 04

16.

These broad phases are overlaid with a migration plan for individual services to migrate to the Customer Contact Centre that is detailed below.

Appendix C-3 lists the actions by unit taking the lead responsibility for implementation. Due to the stage currently reached in the organisational review it has not been possible to have these actions and agreed by the relevant unit managers. However, the actions fall within the specified unit's core competencies.

## Phased implementation for migrating services

The project team are recommending that a phased implementation for moving services to the customer contact centre take place. They have identified 13 different phases for transferring other services' customer contact operations into the new customer contact centre. These different phases and the rationale behind them are shown in Appendix D.

The physical setting up of the customer contact channels, implementation of the action plan recommendations and the phased transfer of customer services all running alongside each other will present a challenge in terms of timing and scheduling. Effective project management will be required to ensure that the programme keeps on track. Therefore the project team are recommending that a full time project manager be designated to manage the process to ensure its success.

17.

## Conclusion

The current customer service within the Authority is in urgent need of improvement. It is not possible to modify the current service to a point where a significant improvement in customer service would be noticed. A more fundamental approach is needed to obtain measurable results.

By adopting the recommendations in this report, a radically altered service will be implemented which will deliver the customer service improvements required and demonstrate the Council is seen as improving and modernising. More importantly, the Council will have produced a valuable asset, a customer contact centre, which other services and partners will be able to draw upon in the future.

## Thanks

The following members of the review team are thanked for their valuable input and time given up during the course of the review.

Brian Blackburn Penny Crack
Ian Dixon          Karen Hook
Jelena Kontic      Ian Lunn
Jo Pointing        Mary Robertson
Gill Wadeson       Les Tickner
Sharon McKee  Mark Whitworth

Lynne Wild – Consultation & Research

Thanks are also extended to the large number of people, both internal and external, who have contributed by way of consultation during the course of the review.

18.

## Customer Contact - Model for Carlisle City

The Corporate Resources Overview and Scrutiny Committee have approved the overall shape of the new customer contact service within the Authority. This paper outlines in more detail the new model for dealing with customers who contact the Authority for a variety of services, advice and transactions

### Recommendations:-

1) That a separate unit be established to manage and operate all initial contacts with the general public
2) That a central physical contact centre be established by consolidating existing reception centres within the Civic Centre
3) That a central telephone service be developed to deal with all telephoned customers service requests
4) That a new access channel be developed to include e-mail and web access
5) That, whatever the channel utilised by a customer, they always receive the same high level of service
6) That a corporate wide customer care culture be established
7) That partner access channels be established
8) That the customer service methodologies, tools and services be available to back office staff
9) That the service, although managed and operated by a customer service manager, should operate under service level agreements with the back office.

### The Vision

It will be possible for any Citizen, within or without the Authority:-

- to make contact using any access method of their choice
- to make contact at any time of their choice
- to have their request satisfied at the first asking or have definite information about when and how they might expect the Council to act.

To achieve this the Council will operate a single point of contact for all services and enquiries, delivered to the same high level of service, managed and operated as a single entity.

It will brand and actively promote the service it delivers as Carlisle Direct – a working title subject to confirmation. Carlisle Direct will be the primary contact point for requesting services and contacting the Authority.

To deliver this vision the Council will set up a Customer Contact Centre – a central customer service facility located in the Civic Centre (subject to confirmation) to provide:-

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- a central reception service
- a telephone contact service
- an automated electronic contact service
- a mail handling service
- an out of hours service
- a multi channel cash receipting facility.

In addition, Carlisle Direct's role will:-

- Include being tasked not only with the initial customer contact but with delivering those elements of a service which can be dealt with immediately
- Encompass certain elements of what is traditionally recognised as the "back office"
- Have the ultimate long term aim of responding to 80% of all customer contact enquiries directly – though it is recognised this depends on the nature of the service being requested.

Carlisle Direct's role would not deal with professional contacts, scheduled appointments or expert queries where the team would solely act as a signposting service.

The Council will run a partnership programme with the customer contact services of other external organisations to enable them to access a subset of Council services and allow the Council to provide a similar service to the partners' customers.

Eventually all Council services will be accessed through Carlisle Direct, replacing all existing reception services as the programme is rolled out. The only variations to this process will be Tullie House, the Sands Centre (prior to externalisation) and Tourist Information Centres. Due to their different client base and in recognition of their existing high quality customer service these centres will carry on as before. However, they will be expected to become senior partners in the partnership programme providing a range and depth of Council services to the point where they could be described as mini-Council Centres. Similarly, in a move to bring these service cultures together, the Customer Contact Centre will be geared up to provide a range of senior partner services.

[Statement regarding operation of Carlisle Works Operational Centre to be inserted here]

**Supporting the Vision**

Underpinning the customer contact service will be a series of Information, Computer and Telephone (ICT) systems. These will cover the following functional areas:-

1) Knowledge database of services and frequent service requests
2) Call tracking and management system (CRM)

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3) Voice call handling system
4) Visitor queuing system
5) Middleware to connect to back office systems
6) Automated processing of service requests
7) Scanning and video conferencing technologies.

These systems will go much of the way to satisfying the Government's requirement on the Authority of ensuring that all transactions with the public are capable of being delivered electronically by 2005.

**The Benefits**

*Improved access to service*

It won't be necessary for any customer to understand the structure of the Council to access the service they require.
A new electronic service channel will be introduced.
The hours during which customers may contact the Council will be more suited to them.

*Improved levels of service*

The customer will always be given information about how their service request will be taken forward at the first point of contact.
Resources may be switched within the Customer Contact Centre to meet peak and unexpected demand.
It will be possible to offer services that are linked together at the same point of contact.

Improved quality of service

Customers will have their requests dealt with to a consistent standard.
The service will be subject to a continuous improvement regime and will aim to achieve a nationally recognised service qualification.

Improved management of service

Meaningful management information becomes available about our client base and the nature and volumes of the services they request. This will help in the planning and directing of the Council resources in the future.
There will be an identified officer who has responsibility for the overall customer contact service within the Authority.

**Back office experts**

Whilst most of the business arising from customer contacts will be dealt with by the Customer Contact Centre staff there will always be a need for senior and more experienced staff to deal with those queries that are specialised, more difficult or non-routine in nature. These may form a large number at first but the aim is to reduce these to 20% of service calls. To cater

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for these non-standard enquiries, the specialist staff will need to be available to augment the customer service staff. In other customer contact centres this is achieved by the permanent secondment of staff on a rotational basis to the unit where transaction volumes are high or a standby rota system where such transactions are lower. The obvious gain here for service managers is that they relieve their skilled staff from routine customer service tasks to allow them to concentrate on mainstream back office activities.

## Resourcing Carlisle Direct

The revenues and capital budget considerations are still being assessed.
The set-up cost should include a project officer required to help during the implementation.

No new function is being undertaken by the creation of the customer service team and so there should not be any extra cost. The same work is being carried out but in another Unit. A large section of the customer service team will be resourced by reallocating the resources from where the function is currently performed to the new unit. In those cases where there is an identifiable member of staff associated with an existing customer contact function they will be transferred to Carlisle Direct.

However, the best value review team is aware that the people carrying out customer contact duties within Units at the moment are also carrying out other duties which will still need to be performed after the transfer. To avoid a complicated process of job evaluation Managers for the new Business Units will be expected to release staff to the new customer contact centre and reorganise accordingly. It is thought this will be possible because:-

 i)  consolidation of business units after the organisational review will produce efficiency gains

 ii)  the customer contact centre will take over customer contact on behalf of unit's and hence reduce some of their responsibilities

Audit has been asked to conduct a transaction analysis of those budgets associated with customer contact with a view to re-allocating these to the new unit.

Each service will have to be approached individually to establish how much of their front end service will transfer. It will make more sense if this process is carried out with the new Heads of Service following the organisational review.

The Council will be expected to invest a significant capital amount in the creation of the Customer Contact Centre.

A large proportion of the technology aspect of Carlisle Direct will be funded through year one IEG money.

The servicing of customer contact from within one specialised unit will produce economies of scale that will make up any overall resource shortfall.

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New resources have already been found by the Council to support improved customer contact. A significant investment has been made by the Authority in a call handling system and the Council has agreed to create the new post of Web Designer. It's interesting to note that investment in customer services need not necessarily be made directly in the Customer Contact Centre. It 's a sign of the changing culture of the Council that investment made in one part of the Authority is now considered to be made available for use elsewhere.

**Migration towards Carlisle Direct**

There will be a phased roll out with the main operational services moving over their customer service elements as part of the detailed implementation plan arising from the Best Value Review.

The phasing should also apply to the access channels. The order of implementation here would be face to face, electronic, telephone and then mail.

**The relationship between the back office and Carlisle Direct**

There will be a normal and natural reluctance at first for service managers to release the front office element of their service. This is especially true when coupled with some resource (budget and staff) transfer.

However, Unit managers are urged to look at the bigger picture. One of the prime objectives of the current organisational review is to break up silo working and facilitate cross service working. The traditional concept of vertical delivery of services must be left behind. Business Units should view the customer contact service as being an extension of their existing service. Importantly, the Review Team has reached the conclusion that for this to happen then Carlisle Direct must be considered to be acting in a contractor role for customer contact on behalf of the other business units of the Authority. In addition, by passing those elements known as "commodity transactions" to the customer contact centre their services will be freed to focus on their core activities.

Attention is drawn to Business Unit managers that for Carlisle Direct to be successful, the front office staff will need access to back office information systems. This will obviously need to be done in a controlled manner but is essential for dealing with routine enquiries. However, the Customer Service Manager is served notice that this access to information systems is bilateral. The Client Business Units will have access to Carlisle Direct's customer contact information systems.

**The relationship between Carlisle Direct and the corporate aims and objectives**

Customer Contact Model
Appendix A

5

## Appendix B
## FINAL REPORT

The new corporate plan has set targets for customer service.
These are awaiting confirmation of the corporate plan by Council.

In general terms the customer service team would seek to strive for continuous improvement in terms of quality of service, volumes of transactions handled and the success of the new electronic access channel.

Because customer contact is controlled through a separate unit there is a danger that the organisation as a whole loses sight of the fact that it exists to service the needs of the customer. This might lead a Business Unit to detach themselves from customers requirements if they no longer need to undertake customer contact. The review team were particularly impressed by the input from external organisations that customer care should be the responsibility of everyone in an organisation – regardless of where the customer contact is delivered. A customer care culture must be introduced throughout the organisation and be included as part of the induction process for new staff.

CARLISLE CITY COUNCIL
**CUSTOMER CONTACT POLICY**

**We Aim To:**
- Put customers first.
- Develop equality of opportunity to access services.
- Encourage the involvement of the community and to listen to Carlisle residents in developing services.
- Consult local people about the planning and delivery of services.
- Provide the services that people want and need.
- Make sure our services are delivered by well motivated staff who are well informed and trained.
- To provide a service regardless of the office hours of the Council

**Our Staff Will:**
- Be polite, helpful and treat you with respect, in return they will expect you to do the same to them.
- Listen carefully in order to understand and respond to your needs.
- Give their name and wear identification.
- Give you an explanation of their actions.
- If necessary, assign your query to an appropriate, named officer who willfollow through your query from beginning to end and keep you informed of progress.

**When you come to the desk:**
- Our reception desks will be easy to access for everyone wherever possible.
- The reception areas will be clean and welcoming and provide information about Council services in a variety of formats.
- The reception desk opening hours will be 09:00 to 17:00.
- The staff will be trained in customer care practices and will have received disability awareness training. A multi-lingual facility will be available.
- They will be competent, well-informed and helpful on the complete range of services the Council provides.
- All customers will be treated equally, regardless of age, race, gender etc.
- Our reception staff will see you promptly and if they cannot deal with your query, they will arrange for you to see someone who can. If this cannot be done immediately, they will make an appointment for you.
- Whenever possible and if requested, staff will move you to a private interview room to discuss your query.
- If you have an appointment, we will give you an explanation if there is more than a 10 minute delay.

**When you telephone us:**
- We aim to answer your call within 18 seconds.

2s.

- If you ask to speak to a specific individual, you will be put through to them.
- If the person answering your call cannot deal with your query, they will put you through to a named person who can.
- If the person you want to speak to is not available, we will log your call and give that person a message to ring you back as soon as possible.
- If you get through to somebody's voicemail, their message will tell you when they are next available and give you an alternative extension to dial.

## When you write to us or e-mail us:

- We will register your enquiry and we will aim to respond to it within 10 working days.
- If there is a reason why we cannot respond within 10 days, we will acknowledge your enquiry within five working days of receipt, explaining the delay, and aim to reply in full within 15 days of receipt.
- Our reply will identify the employee who is dealing with your enquiry and give contact details.
- The language in our correspondence will be simple, avoiding the use of jargon and will directly answer the questions asked.

## When Council staff visit you at home:

- As far as possible, they will arrange a mutually convenient appointment in advance.
- They will always carry and show you their identification and tell you their name.
- You can ring the Council to check their identification before you invite them in on 01228 817000, should you be concerned.
- They will take a comprehensive note of your query and give you a reference number so you can follow it up easily afterwards. This employee will remain responsible for your query until its conclusion, unless they need to pass it on to a more appropriate person, in which case they will inform you of this and tell you the new name and contact details.
- Our staff will aim to deal with the query you raised at home within 10 working days. If this cannot be done, they will tell you why, either by letter, e-mail if requested or telephone call, within 5 working days.

## If you have any complaints:

- You should complain if you think that:-
    - We have failed to do something we should have done
    - We have agreed to do something but haven't
    - We have given a poor service
    - We have treated you unfairly or discourteously.
- We will first try to resolve your complaint informally at the reception facility either in person, by letter, phone or e-mail. The customer service staff will contact the appropriate business unit for you.
- If your complaint cannot be solved this way, the reception staff will give you a complaints form to complete (they can help you do this if you wish). If you complete it at home, no

stamp is required to post it back to us. The complaints form is also available from community centres and other City Council buildings.

- When we receive your complaint form, we will register it and send you an acknowledgement within five working days. Your complaint will be investigated by a manager of the business unit concerned and a response will be issued to you within 15 working days of receiving your complaint.
- If you are still not satisfied with the result of your complaint, you should contact the Head of Committee and Administrative Services who will call a Board of Arbitration made up of three City Councillors. They will examine your complaint and discuss it with you. Their decision will be sent to you within 20 working days of your meeting with them.
- If you remain dissatisfied, you can complain to the Local Government Ombudsman. Contact Civic Centre reception and they will send you information on how to go about this.

**Contact Information:**

**Carlisle City Council**
**Civic Centre**
**Rickergate**
**CARLISLE**
**CA3 8QG**

| | |
|---|---|
| Telephone: | 01228 817000 |
| Minicom: | 0800 959598 |
| Fax: | 01228 817048 |
| E-mail: | services@carlisle-city.gov.uk |
| Website: | www.carlisle-city.gov.uk |

Appendix A

Action Plan - Master List

| Central Issue | Ref-Id | Detail | Measured Output | Comment |
|---|---|---|---|---|
| Environment | CC-01-ENV-01 | External Location Directors | 1) Location of Civic Centre to be included on road signs leading into the City.<br>2) Civic Centre location to be included on finger posts<br>3) A prominent external sign to be commissioned signifying the location of the Civic Centre. | |
| | CC-02-ENV-02 | Toilets | 1) Improve SLA to increase frequency of cleaning<br>2) Clearer signposting<br>3) Cosmetic "makeover"<br>4) Eventual re-location to a better site | |
| | CC-03-ENV-03 | Effective Internal Signposting | 1) Employ signs that use graphical/pictorial elements<br>2) Utilise staff to direct customers<br>3) Signs to relate to services required rather than Council structure<br>4) Consistent signposting across all mediums including voice and electronic | |
| | CC-04-ENV-04 | Corporate standardisation of Customer Care | 1) Create quality customer care standards for the Authority<br>2) Arrange standard to be adopted and rolled out | |

Action Plan – Master List

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| | | | corporately<br>3) Seek to adopt a nationally recognised qualification in the area of customer care | |
|---|---|---|---|---|
| | CC-05-ENV-05 | Display Area | 1) Redesign the public area for displaying notices and announcements.<br>2) New standards for displaying material to be created and implemented – to include all mediums including voice and electronic<br>3) Controls to be put in place to maintain those standards | |
| | CC-06-ENV-06 | Reception Area | 1) Visitors with appointments to see officers are not to be directed unescorted to Departments.<br>2) An area set to be set aside to wait whilst awaiting someone to come down and greet and escort visitors to where they need to be. | Issue of frequent visitors to be resolved |
| | CC-07-ENV-07 | Nominated staff | 1) Nominated staff to work full time on customer contact as their primary and only function. | Specialist will produce a better service than staff who only do it as part of another job. |
| | CC-08-ENV-08 | Environment beyond Civic | 1) Better presentation of services across all mediums including voice and electronic before customers makes contact.<br>2) A budget to be set aside to promote access to services. | |
| | CC-09-ENV-09 | Staff Facilities | 1) Tea/staff room available to customer service staff | Well motivated staff equals a better service |
| | CC-10-ENV-10 | Extended opening hours | 1) Market test extended opening hours particularly late night Thursday night opening and Saturday morning. | Foyer services only in order to test demand |

Action Plan – Master List

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|---|---|---|---|---|
| | CC-11-ENV-11 | Customer Identification | 1) A separation in entrance design to distinguish between customer and staff traffic flows<br>2) Deliveries to be regulated to minimise disruption of drop's, collections and associated storage problems in the main foyer. | The redesign of the foyer will determine what is possible in terms of separation |
| | CC-12-ENV-12 | Porters & Telephonists | 1) Porters need to be relocated from main entrance but close enough to provide security function.<br>2) Telephonists will form part of the customer contact service but station will need relocating | |
| | CC-13-ENV-13 | Meeting and Greeting | 1)All customers to be acknowledged when making contact. Met and greeted at reception points and acknowledged through other access channels. | |
| | CC-14-ENV-14 | Customer contact restricted to ground floor only | 1)Customers should be attended to at a main floor reception with officers coming to them if necessary.<br>2)Eliminate non ground floor reception points. | Expert advice needs to be taken on this point |
| | CC-15-ENV-15 | Customer Contact Location | 1) Property Manager to advise on utilising alternative locations for customer contact (Assembly Rooms, "Thrupenny bit" town centre retail premises) or plan to redesign existing reception area. | |
| | CC-16-ENV-16 | Electronic Signposting | 1) Replacement of current keepers board and the introduction of an electronic information and messaging board. | |
| | CC-17-ENV-17 | Extend access through electronic access points | 1) Use of kiosks, phones and video conferencing | Particularly in the use of phone technology for transactional type queries |
| | CC-18-ENV-18 | Pictorial coding of services | 1) Similar idea to that used in train stations and airports:- | |

Action Plan – Master List

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|---|---|---|---|---|
| | | | Blue for Council Tax, Green for Cashiers etc. | |
| | CC-19-ENV-19 | Improve reception area furniture for customers | 1) Review and provide suitable tables, chairs, supermarket queuing/ticketing system, pens etc. | |
| | CC-20-ENV-20 | First Hit Enquiries | 1)Provide an iterative method to improve the ratio of enquiries that are answered at the first asking 2)Front office staff to be empowered to make decisions on services | Process to commence in APR/03 with the commencement of the voice/electronic service |
| | CC-21-ENV-21 | Utilise existing resources | 1) Extend/Incorporate the Careline, CCTV operations and/or other existing resources as part of out of hours customer contact | |
| | CC-22-ENV-22 | New working methods | 1) Generic working to become standard practice for customer contact staff 2) Customer contact home working to be trialed to provided out of hours by home workers and test of IC | |
| | CC-23-ENV-23 | Extend opening hours | 1) Hours of customer contact voice service to be extended to 24/365. | |
| | CC-24-ENV-24 | Extend electronic access to services | 1) Promote electronic access as the primary route to services 2) Services delivered 24x7 through electronic service delivery aimed at meeting Governments 2005 targets. | Strong feeling there must always be the option to make physical contact – but balanced with the growing demand for these services and their cost effectiveness |
| | CC-25-ENV-25 | Cashiers | 1) Investigate retail and banking sectors to learn best practice on the physical aspects of receipting cash. 2) Implement any best practice that might be applicable in this area. | Expert advice needs to be sought on this point |
| | CC-26-ENV-26 | Counter Screens | 1) Implement different types of staff/customer screen | As above |

Action Plan – Master List

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| | | | solutions at reception areas. | |
|---|---|---|---|---|
| | CC-27-ENV-27 | Joint service provision | 1) Utilisation of a physical, open environment, in conjunction with partners and other agencies to deliver services. | Partnership working |
| | CC-28-ENV-28 | Filter desk | 1) Establish an early filter desk to fast track some customer requests | Some customers requests can be dealt with easily and quickly |
| Owners hip | CC-29-OWN-01 | I.T. improvements | 1) Implement a problem management/tracking/reporting (CRM) system | Initial Specification can be worked upon |
| | CC-30-OWN-02 | Underpinned by Service Level Agreements | 1) Implement a two way service level agreement between the front office staff and the supporting Departments | Staff and customers to be involved in setting SLA's |
| | CC-31-OWN-03 | Cross departmental approach | 1) Consistent corporate approach to be developed to deal with customer requests | |
| | CC-32-OWN-04 | Request targeting | 1) Establish efficient filtering of requests, to direct request to the person/place best able to help | |
| | CC-33-OWN-05 | Awareness Raising | 1) Arrange customer care awareness training courses for staff/management/members | |
| | CC-34-OWN-06 | Comment and suggestion sheets | 1) Institute formal arrangement for considering suggestions and comments | Responding to these will also encourage ownership |
| | CC-35-OWN-07 | Back office to create & retain ownership | 1) Develop procedure so that scripts, flowcharts, decision tree's for the front office originate and be maintained by specialist back office staff. | |
| | CC-36-OWN-08 | Joint Back/Front office ownership | 1) Develop a series of joint front/back office performance indicators | |
| | CC-37-OWN-09 | SLA Database | 1) Develop an SLA database to control and monitor the interaction between front and back office – connected to | |

Action Plan – Master List

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| | | | any CRM solution implemented | |
|---|---|---|---|---|
| | CC-38-OWN-10 | Cross department approach | 1) Joint Team Improvement Reviews (TIR's), SLA's and Service Improvement Plans to be developed between front office and back office staff. | |
| | CC-39-OWN-11 | Training of back office staff on customer contact | 1) Agree a regime where back office staff are trained and exposed to customer contact situations. | It is an importance principal that back office staff should not lose sight of the importance of customer contact. Perhaps mentoring or using a buddy system |
| Perform ance Manage mnt | CC-40-PERF-01 | Best practice dissemination | 1) Agree PI's for Customer Service 2) New mechanism needed to review and implement any best practices that are identified | |
| | CC-41-PERF-02 | Publish PI's | 1) Publish PI's for staff and customers. | These should be at frequent intervals to enable positive feedback for any improvements implemented to be visible |
| | CC-42-PERF-03 | Quality to be measured | 1) Include quality measurements in agreed PI's s | PI's should not be entirely a quantitative measure |
| | CC-43-PERF-04 | Multi-channel PI's | 1) Agree PI's which take account of all customer channels including voice,mail and electronic channels | |
| | CC-44-PERF-05 | Customer satisfaction surveys | 1) Perform survey's on a regular basis, feeding TIR's as a method of improving performance | Initially – and then every six months thereafter |
| | CC-45-PERF-06 | Staff satisfaction surveys | 1) Staff survey's driving TIR's, leading to service improvements | Initially – and then every six months thereafter |
| | CC-46-PERF- | Customers satisfied at first | 1) Arrange to measure this vital statistic on a frequent | This is a key measurement to drive |

Action Plan – Master List

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| | 07 | contact | basis. | and improve customer contact and should be measured on a daily basis. |
|---|---|---|---|---|
| | CC-47-PERF-08 | Formal external measurement of customer service | 1) Aim to be an IDeA Level 5 Authority. 2) Check if any other external verification of customer service that are applicable. E.g. Chartermark, ECQFM | |
| | CC-48-PERF-09 | IT System required | 1) Automate PI recording and measurement. | A system, preferably digital and automatic, is required for resource planning and performance measurement of any and all customer contact channels. |
| | CC-49-PERF-10 | Quality responses tailored to customer need | 1) Design customer contact procedures to be flexible enough to meet the differing needs of the customer base. | If some customers require more time to be dealt with than others, then this needs to be allowed for. E.g. NHS Direct |
| Commu nication | CC-50-COM-01 | Electronic communication | 1) Procure and implement an intranet system to be a knowledge repository for all service information | Both front and back office will require access. |
| | CC-51-COM-02 | Published material | 1) Create a centralised digital library containing all published material | |
| | CC-52-COM-03 | Immediacy | 1) All communication channels to be immediate and real time where possible | Aim to minimise the reliance on any type of queuing system |
| | CC-53-COM-04 | Customer surveys & market research | 1) Establish closer links between the results of such exercises and service improvement plans | |
| | CC-54-COM-05 | Access channels to be customisable | 1) Establish the capability of access channels to be customisable in specific circumstances | To allow for short term campaigning, promotions, service specific messages etc. |

Action Plan – Master List

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| | | | | |
|---|---|---|---|---|
| | CC-55-COM-06 | Consistent consultation | 1) Consistent levels for all consultation exercises to be established. | |
| Organis ation-i) Central point of contact | CC-56-ORG-01 | Central Service Desk | 1) Creation of a central service desk in the foyer area manned with generic Customer Service Staff<br>2) All enquiries to be routed though this facility<br>3) Customer Service Staff to also deal with initial voice, mail and electronic contact. | |
| | CC-57-ORG-02 | Customer Service Manager | 1) Appoint a Customer Service Manager with specific customer contact and customer service information | |
| | CC-58-ORG-03 | Interim Arrangements | 1) Customer Service Manager to assume control of existing customer contact arrangements during the transition to the new service structure | Will ensure that reception points are not consolidated into any new Unit structure arising from the Organisational Review |
| | CC-59-ORG-04 | Staff | 1) Appoint to the Service desk staff who are orientated towards customer contact | |
| | CC-60-ORG-05 | Common contact point | 1) Employ a common phone number, e-mail address, mail address, reception for all customer contact for the Authority | |
| | CC-61-ORG-06 | Focused staff | 1) Ensure customer service staff are separated from other non-core duties | |
| | CC-62-ORG-07 | Identity required | 1) Adopt a separate identity or branding, themed within any corporate branding, so customers can immediately identify locations and sources of help | |
| | CC-63-ORG-08 | Secure environment | 1) Contact Centre to be secure – covered by CCTV and visible people/security presence | |
| ii) Silo | CC-64-ORG-09 | Knowledge dissemination | 1) Create a knowledge customer service data base / hub | |

Action Plan – Master List

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| Working | | | intranet | |
|---|---|---|---|---|
| | CC-65-ORG-10 | 80% threshold | 1)80% of calls to be answerable directly<br>2)Answers to common service requests should be available to all council staff via an intranet who should be encouraged field queries | This links to the Corporate Plan which projects 40% by the AUG/03 and 65% by MAR/04 |
| | CC-66-ORG-11 | Transferred calls PI | 1) Create a Transferred Call's PI as an alternative measurable to "Calls answered on first contact". | A high level of transfers might indicate a back office silo mentality |
| | CC-67-ORG-12 | CRM | 1) CRM system to be available as a corporate resource throughout whole organisation | Breaks down any Customer Service Unit silo mentality that could develop |
| | CC-68-ORG-13 | Consistent decisions | 1) Employ rules based decision making especially in discretionary situations to ensure consistency | |
| iii)Links to partner organisations | CC-69-ORG-14 | Exposure to external influences | 1) Network with similar operations to gain exposure to best practice | |
| | CC-70-ORG-15 | Identify benefits | 1) Identify and quantify the benefits to customers of such links to enable prioritisation | |
| | CC-71-ORG-16 | Training | 1) Consider joint training with other organisations | |
| | CC-72-ORG-17 | Joint policy formulation | 1) Establish joint customer care policies and strategies | |
| | CC-73-ORG-18 | Common channels | 1) Create common access channels and interfaces to be established with partner organisations | |
| | CC-74-ORG-19 | SLA | 1) Establish SLA's with partner organisations | |
| iv)Corporate | CC-75-ORG-20 | Handbook and induction training | 1) Customer contact to be included in induction training and training to be extended to include existing staff | |

Action Plan – Master List

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| Approach | | | | |
|---|---|---|---|---|
| | CC-76-ORG-21 | Customer contact policy | 1) Establish a working party to generate and maintain customer contact policy. | Possible representatives include Portfolio Holder, Customer Service Manager, staff rep, Department Head, rotating head of service, customer rep |
| | CC-77-ORG-22 | Global PI's | 1) Identify and introduce of global PI's | . |
| | CC-78-ORG-23 | CMT Involvement | 1) Establish Customer contact/care as a standing item at CMT | |
| | CC-79-ORG-24 | Reporting | 1) Institute a reporting regime on customer contact to portfolio holder, Overview and Scrutiny and Executive | |
| v)Customer Orientation | CC-80-ORG-25 | Customer suggested improvements | 1)Investigate methods to encourage customer improvements to service 2)Respond proactively to any such suggestions | E.g. Suggestion books, boxes etc. routed thro' to "Standing Committee". |
| | CC-81-ORG-26 | Service flexibility | 1) Service to be reviewed on a regular basis to check whether the basis for the service has changed and to adapt to changing customer needs | First of a series of annual reviews |
| | CC-82-ORG-27 | Service statement | 1) Customer Service Manager to produce an annual "state of the service" statement | First of a series of annual reviews |
| | CC-83-ORG-28 | Disability Access | 1) Conduct a complete review of disability access to the customer contact service in conjunction with the Disability Action Group | |
| | CC-84-ORG-29 | BV Disability Review | 1) Consideration to be given to including Disability Access to all services into the BV Plan as a thematic review | |

Action Plan – Master List

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| vi)Customer Care Culture | CC-85-ORG-30 | Implement customer care culture | 1) Create a customer care culture<br>2) Maintain a programme to maintain that culture | |
| | CC-86-ORG-31 | Link to TIR's | 1)Customer care to become a standing item on TIR's.<br>2)Mandatory TNA customer care entry for all staff. | |
| | CC-87-ORG-32 | External service verification | 1) Externally driven, inspected and tested care standard. Examining body yet to be identified:- Chartermark, ISO, BSI etc. | |

Action Plan – Master List

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The following table lists the Action Plan Recommendations by date order. The overall plan is to

a) Set up the Customer Services Unit - Dec 02
b) Commence Voice and Electronic Service – Apr 03
c) Arrange the out of hours service – Jun 03
d) Set up mail contact service – Jul 03
e) Commence face to face service - Aug 03
f) Initial partnership working – Jan 04

- This will be overlaid by the phased migration, in 13 stages, of current front office services. See the migration plan outlined elsewhere in this document

| Target End date | Ref-Id | Detail | Measured Output |
|---|---|---|---|
| AUG/02<br>AUG/02<br>AUG/02 | CC-02-ENV-02 | Toilets | 1) Improve SLA to increase frequency of cleaning<br>2) Clearer signposting<br>3) Cosmetic "makeover" |
| AUG/02 | CC-05-ENV-05 | Display Area | 1) Redesign the public area for displaying notices and announcements. |
| AUG/02 | CC-15-ENV-15 | Customer Contact Location | 1) Property Manager to advise on utilising alternative locations for customer contact (Assembly Rooms, "Thrupenny bit" town centre retail premises) or plan to redesign existing reception area. |
| OCT/02 | CC-04-ENV-04 | Corporate standardisation of Customer Care | 1) Create quality customer care standards for the Authority |
| NOV/02 | CC-57-ORG-02 | Customer Service Manager | 1) Appoint a Customer Service Manager with specific customer contact and customer service information |

Action Plan – By Date
Appendix C-2

| DEC/02 | CC-04-ENV-04 | Corporate standardisation of Customer Care | 2) Arrange standard to be adopted and rolled out corporately |
|---|---|---|---|
| DEC/02 | CC-07-ENV-07 | Nominated staff | 1) Nominated staff to work full time on customer contact as their primary and only function. |
| DEC/02 | CC-58-ORG-03 | Interim Arrangements | 1) Customer Service Manager to assume control of existing customer contact arrangements during the transition to the new service structure |
| JAN/03 | CC-01-ENV-01 | External Location Directors | 1) Location of Civic Centre to be included on road signs leading into the City.<br>2) Civic Centre location to be included on finger posts<br>3) A prominent external sign to be commissioned signifying the location of the Civic Centre. |
| JAN/03 | CC-03-ENV-03 | Effective Internal Signposting | 2) Utilise staff to direct customers<br>3) Signs to relate to services required rather than Council structure |
| JAN/03 | CC-05-ENV-05 | Display Area | 2) New standards for displaying material to be created and implemented – to include all mediums including voice and electronic<br>3) Controls to be put in place to maintain those standards |
| JAN/03 | CC-22-ENV-22 | New working methods | 1) Generic working to become standard practice for customer contact staff |
| JAN/03 | CC-50-COM-01 | Electronic communication | 1) Procure and implement an intranet system to be a knowledge repository for all service information |
| JAN/03 | CC-59-ORG-04 | Staff | 1) Appoint to the Service desk staff who are orientated towards customer contact |
| JAN/03 | CC-61-ORG-06 | Focused staff | 1) Ensure customer service staff are separated from other non- |

Action Plan – By Date
Appendix C-2

| | | | core duties |
|---|---|---|---|
| JAN/03 | CC-78-ORG-23 | CMT Involvement | 1) Establish Customer contact/care as a standing item at CMT |
| JAN/03 | CC-79-ORG-24 | Reporting | 1) Institute a reporting regime on customer contact to portfolio holder, Overview and Scrutiny and Executive |
| APR/03 | CC-08-ENV-08 | Environment beyond Civic | 1) Better presentation of services across all mediums including voice and electronic before customers makes contact. 2) A budget to be set aside to promote access to services. |
| APR/03 | CC-20-ENV-20 | First Hit Enquiries | 1)Provide an iterative method to improve the ratio of enquiries that are answered at the first asking 2)Front office staff to be empowered to make decisions on services |
| APR/03 | CC-24-ENV-24 | Extend electronic access to services | 1) Promote electronic access as the primary route to services |
| APR/03 | CC-29-OWN-01 | I.T. improvements | 1) Implement a problem management/tracking/reporting (CRM) system |
| APR/03 | CC-30-OWN-02 | Underpinned by Service Level Agreements | 1) Implement a two way service level agreement between the front office staff and the supporting Departments |
| APR/03 | CC-31-OWN-03 | Cross departmental approach | 1) Consistent corporate approach to be developed to deal with customer requests |
| APR/03 | CC-32-OWN-04 | Request targeting | 1) Establish efficient filtering of requests, to direct request to the person/place best able to help |
| APR/03 | CC-33-OWN-05 | Awareness Raising | 1) Arrange customer care awareness training courses for staff/management/members |
| APR/03 | CC-35-OWN-07 | Back office to create & retain ownership | 1) Develop procedure so that scripts, flowcharts, decision tree's for the front office originate and be maintained by specialist back |

| | | | office staff. |
|---|---|---|---|
| APR/03 | CC-36-OWN-08 | Joint Back/Front office ownership | 1) Develop a series of joint front/back office performance indicators |
| APR/03 | CC-40-PERF-01 | Best practice dissemination | 1) Agree PI's for Customer Service |
| APR/03 | CC-41-PERF-02 | Publish PI's | 1) Publish PI's for staff and customers. |
| APR/03 | CC-42-PERF-03 | Quality to be measured | 1) Include quality measurements in agreed PI's s |
| APR/03 | CC-43-PERF-04 | Multi-channel PI's | 1) Agree PI's which take account of all customer channels including voice, mail and electronic channels |
| APR/03 | CC-46-PERF-07 | Customers satisfied at first contact | 1) Arrange to measure this vital statistic on a frequent basis. |
| APR/03 | CC-51-COM-02 | Published material | 1) Create a centralised digital library containing all published material |
| APR/03 | CC-52-COM-03 | Immediacy | 1) All communication channels to be immediate and real time where possible |
| APR/03 | CC-53-COM-04 | Customer surveys & market research | 1) Establish closer links between the results of such exercises and service improvement plans |
| APR/03 | CC-54-COM-05 | Access channels to be customisable | 1) Establish the capability of access channels to be customisable in specific circumstances |
| APR/03 | CC-55-COM-06 | Consistent consultation | 1) Consistent levels for all consultation exercises to be established. |
| APR/03 | CC-56-ORG-01 | Central Service Desk | 3)Customer Service Staff to also deal with initial voice, mail and electronic contact. |
| APR/03 | CC-60-ORG-05 | Common contact point | 1) Employ a common phone number, e-mail address, mail address, reception for all customer contact for the Authority |
| APR/03 | CC-62-ORG-07 | Identity required | 1) Adopt a separate identity or branding, themed within any corporate branding, so customers can immediately identify |

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Action Plan – By Date

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| | | | locations and sources of help |
|---|---|---|---|
| APR/03 | CC-64-ORG-09 | Knowledge dissemination | 1) Create a knowledge customer service data base / hub intranet |
| APR/03 | CC-66-ORG-11 | Transferred calls PI | 1) Create a Transferred Call's PI as an alternative measurable to "Calls answered on first contact". |
| APR/03 | CC-77-ORG-22 | Global PI's | 1) Identify and introduce of global PI's |
| JUN/03 | CC-03-ENV-03 | Effective Internal Signposting | 4) Consistent signposting across all mediums including voice and electronic |
| JUN/03 | CC-18-ENV-18 | Pictorial coding of services | 1) Similar idea to that used in train stations and airports:- Blue for Council Tax, Green for Cashiers etc. |
| JUN/03 | CC-21-ENV-21 | Utilise existing resources | 1) Extend/Incorporate the Careline, CCTV operations and/or other existing resources as part of out of hours customer contact |
| JUN/03 | CC-23-ENV-23 | Extend opening hours | 1) Hours of customer contact voice service to be extended to 24/365. |
| JUN/03 | CC-25-ENV-25 | Cashiers | 1) Investigate retail and banking sectors to learn best practice on the physical aspects of receipting cash. |
| JUN/03 | CC-34-OWN-06 | Comment and suggestion sheets | 1) Institute formal arrangement for considering suggestions and comments |
| JUN/03 | CC-37-OWN-09 | SLA Database | 1) Develop an SLA database to control and monitor the interaction between front and back office – connected to any CRM solution implemented |
| JUN/03 | CC-38-OWN-10 | Cross department approach | 1) Joint Team Improvement Reviews (TIR's), SLA's and Service Improvement Plans to be developed between front office and back office staff. |
| JUN/03 | CC-44-PERF-05 | Customer satisfaction surveys | 1) Perform survey's on a regular basis, feeding TIR's as a method of improving performance |

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| | | | |
|---|---|---|---|
| JUN/03 | CC-45-PERF-06 | Staff satisfaction surveys | 1) Staff survey's driving TIR's, leading to service improvements |
| JUN/03 | CC-67-ORG-12 | CRM | 1) CRM system to be available as a corporate resource throughout whole organisation |
| JUN/03 | CC-68-ORG-13 | Consistent decisions | 1) Employ rules based decision making especially in discretionary situations to ensure consistency |
| JUN/03 | CC-71-ORG-16 | Training | 1) Consider joint training with other organisations |
| JUN/03 | CC-75-ORG-20 | Handbook and induction training | 1) Customer contact to be included in induction training and training to be extended to include existing staff |
| JUN/03 | CC-76-ORG-21 | Customer contact policy | 1) Establish a working party to generate and maintain customer contact policy. |
| JUN/03 | CC-80-ORG-25 | Customer suggested improvements | 1) Investigate methods to encourage customer improvements to service <br> 2) Respond proactively to any such suggestions |
| JUN/03 | CC-84-ORG-29 | Implement customer care culture | 1) Create a customer care culture <br> 2) Maintain a programme to maintain that culture |
| JUN/03 | CC-85-ORG-30 | Link to TIR's | 1) Customer care to become a standing item on TIR's. <br> 2) Mandatory TNA customer care entry for all staff. |
| JUL/03 | CC-83-ORG-28 | Disability Access | 1) Conduct a complete review of disability access to the customer contact service in conjunction with the Disability Action Group |
| AUG/03 | CC-02-ENV-02 | Toilets | 4) Eventual re-location to a better site |
| AUG/03 | CC-03-ENV-03 | Effective Internal Signposting | 1) Employ signs that use graphical/pictorial elements |
| AUG/03 | CC-06-ENV-06 | Reception Area | 1) Visitors with appointments to see officers are not to be directed unescorted to Departments. <br> 2) An area set to be set aside to wait whilst awaiting someone to come down and greet and escort visitors to where they need to |

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|  |  |  | be. |
|---|---|---|---|
| AUG/03 | CC-09-ENV-09 | Staff Facilities | 1) Tea/staff room available to customer service staff |
| AUG/03 | CC-11-ENV-11 | Customer Identification | 1) A separation in entrance design to distinguish between customer and staff traffic flows |
|  |  |  | 2) Deliveries to be regulated to minimise disruption of drop's, collections and associated storage problems in the main foyer. |
| AUG/03 | CC-12-ENV-12 | Porters & Telephonists | 1) Porters need to be relocated from main entrance but close enough to provide security function. |
|  |  |  | 2) Telephonists will form part of the customer contact service but station will need relocating |
| AUG/03 | CC-13-ENV-13 | Meeting and Greeting | 1)All customers to be acknowledged when making contact. Met and greeted at reception points and acknowledged through other access channels. |
| AUG/03 | CC-14-ENV-14 | Customer contact restricted to ground floor only | 1)Customers should be attended to at a main floor reception with officers coming to them if necessary. |
|  |  |  | 2)Eliminate non ground floor reception points. |
| AUG/03 | CC-16-ENV-16 | Electronic Signposting | 1) Replacement of current keepers board and the introduction of an electronic information and messaging board. |
| AUG/03 | CC-19-ENV-19 | Improve reception area furniture for customers | 1) Review and provide suitable tables, chairs, supermarket queuing/ticketing system,  pens etc. |
| AUG/03 | CC-26-ENV-26 | Counter Screens | 1) Implement different types of staff/customer screen solutions at reception areas. |
| AUG/03 | CC-28-ENV-28 | Filter desk | 1) Establish an early filter desk to fast track some customer requests |
| AUG/03 | CC-48-PERF-09 | IT System required | 1) Automate PI recording and measurement. |
| AUG/03 | CC-49-PERF-10 | Quality responses tailored to | 1) Design customer contact procedures to be flexible enough to |

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| | | customer need | meet the differing needs of the customer base. |
|---|---|---|---|
| AUG/03 | CC-56-ORG-01 | Central Service Desk | 1)Creation of a central service desk in the foyer area manned with generic Customer Service Staff<br>2)All enquiries to be routed though this facility |
| AUG/03 | CC-63-ORG-08 | Secure environment | 1) Contact Centre to be secure – covered by CCTV and visible people/security presence |
| AUG/03 | CC-65-ORG-10 | 80% threshold | 2)Answers to common service requests should be available to all council staff via an intranet who should be encouraged field queries |
| OCT/03 | CC-10-ENV-10 | Extended opening hours | 1) Market test extended opening hours particularly late night Thursday night opening and Saturday morning. |
| OCT/03 | CC-25-ENV-25 | Cashiers | 2) Implement any best practice that might be applicable in this area. |
| DEC/03 | CC-17-ENV-17 | Extend access through electronic access points | 1) Use of kiosks, phones and video conferencing |
| DEC/03 | CC-22-ENV-22 | New working methods | 2) Customer contact home working to be trialed to provided out of hours by home workers and test of IC |
| DEC/03 | CC-39-OWN-11 | Training of back office staff on customer contact | 1) Agree a regime where back office staff are trained and exposed to customer contact situations. |
| DEC/03 | CC-40-PERF-01 | Best practice dissemination | 2) New mechanism needed to review and implement any best practices that are identified |
| DEC/03 | CC-47-PERF-08 | Formal external measurement of customer service | 1) Aim to be an IDeA Level 5 Authority.<br>2) Check if any other external verification of customer service that are applicable. E.g. Chartermark, ECQFM |
| DEC/03 | CC-81-ORG-26 | Service flexibility | 1) Service to be reviewed on a regular basis to check whether the basis for the service has changed and to adapt to changing |

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| | | | customer needs |
|---|---|---|---|
| DEC/03 | CC-84-ORG-29 | BV Disability Review | 1) Consideration to be given to including Disability Access to all services into the BV Plan as a thematic review |
| JAN/04 | CC-27-ENV-27 | Joint service provision | 1) Utilisation of a physical, open environment, in conjunction with partners and other agencies to deliver services. |
| JAN/04 | CC-69-ORG-14 | Exposure to external influences | 1) Network with similar operations to gain exposure to best practice |
| JAN/04 | CC-70-ORG-15 | Identify benefits | 1) Identify and quantify the benefits to customers of such links to enable prioritisation |
| JAN/04 | CC-72-ORG-17 | Joint policy formulation | 1) Establish joint customer care policies and strategies |
| APR/04 | CC-04-ENV-04 | Corporate standardisation of Customer Care | 3) Seek to adopt a nationally recognised qualification in the area of customer care |
| APR/04 | CC-73-ORG-18 | Common channels | 1) Create common access channels and interfaces to be established with partner organisations |
| APR/04 | CC-74-ORG-19 | SLA | 1) Establish SLA's with partner organisations |
| APR/04 | CC-82-ORG-27 | Service statement | 1) Customer Service Manager to produce an annual "state of the service" statement |
| JUN/04 | CC-86-ORG-31 | External service verification | 1) Externally driven, inspected and tested care standard. Examining body yet to be identified:- Chartermark, ISO, BSI etc. |
| JAN/05 | CC-24-ENV-24 | Extend electronic access to services | 2) Services delivered 24x7 through electronic service delivery aimed at meeting Governments 2005 targets. |
| JAN/05 | CC-65-ORG-10 | 80% threshold | 1)80% of calls to be answerable directly |

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| Lead Responsibility | Ref-Id | Detail | Measured Output | Target End date |
|---|---|---|---|---|
| BU | CC-14-ENV-14 | Customer contact restricted to ground floor only | 1)Customers should be attended to at a main floor reception with officers coming to them if necessary. | 8/03 |
| BU | | | 2)Eliminate non ground floor reception points. | 1/03 |
| CATS | CC-02-ENV-02 | Toilets | 1) Improve SLA to increase frequency of cleaning | 8/02 |
| CATS | | | 2) Clearer signposting | 8/02 |
| CATS | | | 3) Cosmetic "makeover" | 8/02 |
| CATS | CC-01-ENV-01 | External Location Directors | 1) Location of Civic Centre to be included on road signs leading into the City. | 1/03 |
| CATS | | | 2) Civic Centre location to be included on finger posts | 1/03 |
| CATS | | | 3) A prominent external sign to be commissioned signifying the location of the Civic Centre. | 1/03 |
| CATS | CC-09-ENV-09 | Staff Facilities | 1) Tea/staff room available to customer service staff | 8/03 |
| CATS | CC-11-ENV-11 | Customer Identification | 1) A separation in entrance design to distinguish between customer and staff traffic flows | 8/03 |
| CATS | | | 2) Deliveries to be regulated to minimise disruption of drop's, collections and associated storage problems in the main foyer. | 8/03 |
| CATS | CC-12-ENV-12 | Porters & Telephonists | 1) Porters need to be relocated from main entrance but close enough to provide security function. | 8/03 |
| CATS | | | 2) Telephonists will form part of the customer contact | 8/03 |

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1

| | | | service but station will need relocating | |
|---|---|---|---|---|
| | | | | |

| CCC | CC-57-ORG-02 | Customer Service Manager | 1) Appoint a Customer Service Manager with specific customer contact and customer service information | 11/02 |
|---|---|---|---|---|
| CCC | CC-08-ENV-08 | Environment beyond Civic | 2) A budget to be set aside to promote access to services | 4/03 |
| CCC | CC-02-ENV-02 | Toilets | 4) Eventual re-location to a better site | 8/03 |
| CCC | CC-56-ORG-01 | Central Service Desk | 1) Creation of a central service desk in the foyer area staffed with generic Customer Service Staff | 8/03 |

| CISM | CC-07-ENV-07 | Nominated staff | 1) Nominated staff to work full time on customer contact as their primary and only function. | 12/02 |
|---|---|---|---|---|
| CISM | CC-78-ORG-23 | CMT Involvement | 1) Establish Customer contact/care as a standing item at CMT | 1/03 |
| CISM | CC-79-ORG-24 | Reporting | 1) Institute a reporting regime on customer contact to portfolio holder, Overview and Scrutiny and Executive | 1/03 |
| CISM | CC-50-COM-01 | Electronic communication | 1) Procure and implement an intranet system to be a knowledge repository for all service information | 1/03 |
| CISM | CC-52-COM-03 | Immediacy | 1) All communication channels to be immediate and real time where possible | 4/03 |
| CISM | CC-29-OWN-01 | I.T. improvements | 1) Implement a problem management/tracking/reporting (CRM) system | 4/03 |
| CISM | CC-35-OWN-07 | Back office to create & retain ownership | 1) Develop procedure so that scripts, flowcharts, decision tree's for the front office originate and be maintained by specialist back office staff. | 4/03 |
| CISM | CC-64-ORG-09 | Knowledge dissemination | 1) Create a knowledge customer service data base / hub | 4/03 |

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| | | | intranet | |
|---|---|---|---|---|
| CISM | CC-24-ENV-24 | Extend electronic access to services | 1) Promote electronic access as the primary route to services | 4/03 |
| CSIM | | | 2) Services delivered 24x7 through electronic service delivery aimed at meeting Governments 2005 targets. | 1/05 |
| CISM | CC-37-OWN-09 | SLA Database | 1) Develop an SLA database to control and monitor the interaction between front and back office – connected to any CRM solution implemented | 6/03 |
| CISM | CC-17-ENV-17 | Extend access through electronic access points | 1) Use of kiosks, phones and video conferencing | 12/03 |
| CSIM | CC-48-PERF-09 | IT System required | 1) Automate PI recording and measurement. | 8/03 |

| | | | | |
|---|---|---|---|---|
| CSM | CC-04-ENV-04 | Corporate standardisation of Customer Care | 1) Create quality customer care standards for the Authority | 10/02 |
| CSM | | | 2) Arrange standard to be adopted and rolled out corporately | 12/02 |
| CSM | | | 3) Seek to adopt a nationally recognised qualification in the area of customer care | 4/04 |
| CSM | CC-58-ORG-03 | Interim Arrangements | 1) Customer Service Manager to assume control of existing customer contact arrangements during the transition to the new service structure | 12/02 |
| CSM | CC-22-ENV-22 | New working methods | 1) Generic working to become standard practice for customer contact staff | 1/03 |
| CSM | | | 2) Customer contact home working to be trialed to provided out of hours by home workers and test of IC | 12/03 |
| CSM | CC-59-ORG-04 | Staff | 1) Appoint to the Service desk staff who are orientated towards customer contact | 1/03 |

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| CSM | CC-61-ORG-06 | Focused staff | 1) Ensure customer service staff are separated from other non-core duties | 1/03 |
|-----|--------------|---------------|---------------------------------------------------------------------------|------|
| CSM | CC-03-ENV-03 | Effective Internal Signposting | 2) Utilise staff to direct customers | 1/03 |
| CSM | CC-32-OWN-04 | Request targeting | 1) Establish efficient filtering of requests, to direct request to the person/place best able to help | 4/03 |
| CSM | CC-36-OWN-08 | Joint Back/Front office ownership | 1) Develop a series of joint front/back office performance indicators | 4/03 |
| CSM | CC-41-PERF-02 | Publish PI's | 1) Publish PI's for staff and customers. | 4/03 |
| CSM | CC-42-PERF-03 | Quality to be measured | 1) Include quality measurements in agreed PI's s | 4/03 |
| CSM | CC-43-PERF-04 | Multi-channel PI's | 1) Agree PI's which take account of all customer channels including voice,mail and electronic channels | 4/03 |
| CSM | CC-46-PERF-07 | Customers satisfied at first contact | 1) Arrange to measure this vital statistic on a frequent basis. | 4/03 |
| CSM | CC-66-ORG-11 | Transferred calls PI | 1) Create a Transferred Call's PI as an alternative measurable to "Calls answered on first contact". | 4/03 |
| CSM | CC-20-ENV-20 | First Hit Enquiries | 1)Provide an iterative method to improve the ratio of enquiries that are answered at the first asking 2)Front office staff to be empowered to make decisions on services | 4/03 |
| CSM | CC-30-OWN-02 | Underpinned by Service Level Agreements | 1) Implement a two way service level agreement between the front office staff and the supporting Departments | 4/03 |
| CSM | CC-31-OWN-03 | Cross departmental approach | 1) Consistent corporate approach to be developed to deal with customer requests | 4/03 |
| CSM | CC-40-PERF-01 | Best practice dissemination | 1) Agree PI's for Customer Service | 4/03 |
| CSM | | | 2) New mechanism needed to review and implement any | 12/03 |

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| | | | best practices that are identified | |
|---|---|---|---|---|
| CSM | CC-77-ORG-22 | Global PI's | 1) Identify and introduce of global PI's | 4/03 |
| CSM | CC-54-COM-05 | Access channels to be customisable | 1) Establish the capability of access channels to be customisable in specific circumstances | 4/03 |
| CSM | CC-60-ORG-05 | Common contact point | 1) Employ a common phone number, e-mail address, mail address, reception for all customer contact for the Authority | 4/03 |
| CSM | CC-53-COM-04 | Customer surveys & market research | 1) Establish closer links between the results of such exercises and service improvement plans | 4/03 |
| CSM | CC-21-ENV-21 | Utilise existing resources | 1) Extend/Incorporate the Careline, CCTV operations and/or other existing resources as part of out of hours customer contact | 6/03 |
| CSM | CC-23-ENV-23 | Extend opening hours | 1) Hours of customer contact voice service to be extended to 24/365. | 6/03 |
| CSM | CC-25-ENV-25 | Cashiers | 1) Investigate retail and banking sectors to learn best practice on the physical aspects of receipting cash. | 6/03 |
| CSM | | | 2) Implement any best practice that might be applicable in this area. | 10/03 |
| CSM | CC-44-PERF-05 | Customer satisfaction surveys | 1) Perform survey's on a regular basis, feeding TIR's as a method of improving performance | 6/03 |
| CSM | CC-45-PERF-06 | Staff satisfaction surveys | 1) Staff survey's driving TIR's, leading to service improvements | 6/03 |
| CSM | CC-67-ORG-12 | CRM | 1) CRM system to be available as a corporate resource throughout whole organisation | 6/03 |
| CSM | CC-68-ORG-13 | Consistent decisions | 1) Employ rules based decision making especially in discretionary situations to ensure consistency | 6/03 |
| CSM | CC-80-ORG-25 | Customer suggested | 1)Investigate methods to encourage customer | 6/03 |

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| | | improvements | improvements to service | |
|---|---|---|---|---|
| CSM | | | 2)Respond proactively to any such suggestions | 6/03 |
| CSM | CC-34-OWN-06 | Comment and suggestion sheets | 1) Institute formal arrangement for considering suggestions and comments | 6/03 |
| CSM | CC-38-OWN-10 | Cross department approach | 1) Joint Team Improvement Reviews (TIR's), SLA's and Service Improvement Plans to be developed between front office and back office staff. | 6/03 |
| CSM | CC-76-ORG-21 | Customer contact policy | 1) Establish a working party to generate and maintain customer contact policy. | 6/03 |
| CSM | CC-83-ORG-28 | Disability Access | 1) Conduct a complete review of disability access to the customer contact service in conjunction with the Disability Action Group | 7/03 |
| CSM | CC-16-ENV-16 | Electronic Signposting | 1) Replacement of current keepers board and the introduction of an electronic information and messaging board. | 8/03 |
| CSM | CC-56-ORG-01 | Central Service Desk | 2) All enquiries to be routed though this facility | 8/03 |
| CSM | | | 3) Customer Service Staff to also deal with initial voice, mail and electronic contact. | 4/03 |
| CSM | CC-06-ENV-06 | Reception Area | 1) Visitors with appointments to see officers are not to be directed unescorted to Departments. | 8/03 |
| CSM | | | 2) An area set to be set aside to wait whilst awaiting someone to come down and greet and escort visitors to where they need to be. | 8/03 |
| CSM | CC-13-ENV-13 | Meeting and Greeting | 1)All customers to be acknowledged when making contact. Met and greeted at reception points and acknowledged through other access channels. | 8/03 |

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| | | | | |
|------|----------------|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-------|
| CSM  | CC-19-ENV-19   | Improve reception area furniture for customers | 1) Review and provide suitable tables, chairs, supermarket queuing/ticketing system, pens etc.                           | 8/03  |
| CSM  | CC-28-ENV-28   | Filter desk                                    | 1) Establish an early filter desk to fast track some customer requests                                                   | 8/03  |
| CSM  | CC-49-PERF-10  | Quality responses tailored to customer need    | 1) Design customer contact procedures to be flexible enough to meet the differing needs of the customer base.            | 8/03  |
| CSM  | CC-26-ENV-26   | Counter Screens                                | 1) Implement different types of staff/customer screen solutions at reception areas.                                      | 8/03  |
| CSM  | CC-63-ORG-08   | Secure environment                             | 1) Contact Centre to be secure – covered by CCTV and visible people/security presence                                    | 8/03  |
| CSM  | CC-10-ENV-10   | Extended opening hours                         | 1) Market test extended opening hours particularly late night Thursday night opening and Saturday morning.               | 10/03 |
| CSM  | CC-47-PERF-08  | Formal external                                | 1) Aim to be an IDeA Level 5 Authority.                                                                                   | 12/03 |
| CSM  |                | measurement of customer service                | 2) Check if any other external verification of customer service that are applicable.  E.g. Chartermark, ECQFM            | 12/03 |
| CSM  | CC-39-OWN-11   | Training of back office staff on customer contact | 1) Agree a regime where back office staff are trained and exposed to customer contact situations.                     | 12/03 |
| CSM  | CC-81-ORG-26   | Service flexibility                            | 1) Service to be reviewed on a regular basis to check whether the basis for the service has changed and to adapt to changing customer needs | 12/03 |
| CSM  | CC-70-ORG-15   | Identify benefits                              | 1) Identify and quantify the benefits to customers of such links to enable prioritisation                                | 1/04  |
| CSM  | CC-72-ORG-17   | Joint policy formulation                       | 1) Establish joint customer care policies and strategies                                                                 | 1/04  |
| CSM  | CC-27-ENV-27   | Joint service provision                        | 1) Utilisation of a physical, open environment, in conjunction with partners and other agencies to deliver services.     | 1/04  |

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| | | | | |
|---|---|---|---|---|
| CSM | CC-69-ORG-14 | Exposure to external influences | 1) Network with similar operations to gain exposure to best practice | 1/04 |
| CSM | CC-73-ORG-18 | Common channels | 1) Create common access channels and interfaces to be established with partner organisations | 4/04 |
| CSM | CC-74-ORG-19 | SLA | 1) Establish SLA's with partner organisations | 4/04 |
| CSM | CC-82-ORG-27 | Service statement | 1) Customer Service Manager to produce an annual "state of the service" statement | 4/04 |
| CSM | CC-87-ORG-32 | External service verification | 1) Externally driven, inspected and tested care standard. Examining body yet to be identified:- Chartermark, ISO, BSI etc. | 6/04 |
| CSM | CC-65-ORG-10 | 80% threshold | 1)80% of calls to be answerable directly | 1/05 |
| CSM | | | 2)Answers to common service requests should be available to all council staff via an intranet who should be encouraged field queries | 8/03 |

| | | | | |
|---|---|---|---|---|
| CU | CC-05-ENV-05 | Display Area | 1) Redesign the public area for displaying notices and announcements. | 8/02 |
| CU | | | 2) New standards for displaying material to be created and implemented – to include all mediums including voice and electronic | 1/03 |
| CU | | | 3) Controls to be put in place to maintain those standards | 1/03 |
| CU | CC-08-ENV-08 | Environment beyond Civic | 1) Better presentation of services across all mediums including voice and electronic before customers makes contact. | 4/03 |
| CU | CC-62-ORG-07 | Identity required | 1) Adopt a separate identity or branding, themed within any | 4/03 |

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| | | | corporate branding, so customers can immediately identify locations and sources of help | |
|---|---|---|---|---|
| CU | CC-51-COM-02 | Published material | 1) Create a centralised digital library containing all published material | 4/03 |
| CU | CC-18-ENV-18 | Pictorial coding of services | 1) Similar idea to that used in train stations and airports:- Blue for Council Tax, Green for Cashiers etc. | 6/03 |
| CU | CC-03-ENV-03 | Effective Internal Signposting | 1) Employ signs that use graphical/pictorial elements | 8/03 |
| CU | | | 3) Signs to relate to services required rather than Council structure | 1/03 |
| CU | | | 4) Consistent signposting across all mediums including voice and electronic | 6/03 |

| | | | | |
|---|---|---|---|---|
| MSES | CC-33-OWN-05 | Awareness Raising | 1) Arrange customer care awareness training courses for staff/management/members | 4/03 |
| MSES | CC-71-ORG-16 | Training | 1) Consider joint training with other organisations | 6/03 |
| MSES | CC-75-ORG-20 | Handbook and induction training | 1) Customer contact to be included in induction training and training to be extended to include existing staff | 6/03 |
| MSES | CC-85-ORG-30 | Implement customer care culture | 1) Create a customer care culture | 6/03 |
| MSES | | | 2) Maintain a programme to maintain that culture | 6/03 |
| MSES | CC-86-ORG-31 | Link to TIR's | 1)Customer care to become a standing item on TIR's. | 6/03 |
| MSES | | | 2)Mandatory TNA customer care entry for all staff. | 6/03 |

| | | | | |
|---|---|---|---|---|
| PS | CC-15-ENV-15 | Customer Contact Location | 1) Property Manager to advise on utilising alternative locations for customer contact (Assembly Rooms, "Thrupenny bit" town centre retail premises) or plan to | 8/02 |

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| | | | redesign existing reception area. | |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| SPS | CC-55-COM-06 | Consistent consultation | 1) Consistent levels for all consultation exercises to be established. | 4/03 |
| SPS | CC-84-ORG-29 | BV Disability Review | 1) Consideration to be given to including Disability Access to all services into the BV Plan as a thematic review | 12/03 |

# Appendix A

<u>Service Migration</u>

The review team are recommending a phased changeover from the current service to the new one.

The table below shows how the services could be migrated over a period of time and the rationale behind the decisions the selecting and sequencing of the phases.

Allowing two months for the changeover of each service the whole process would take some two years to complete.

| Phase | Business Area | Comment |
|---|---|---|
| 1 | Reception, Main switch, keepers desk etc. | Look to establish the unit, put in place and settle procedures and staff |
| 2 | Personnel | 1) Test out re-engineering and transfer skills and create written procedures for further service take-on's<br>2) Low volume<br>3) Varied access channel<br>4) Closure of second floor reception area and exclusion to the public |
| 3 | Licensing | 1) Tests officers required to come to desk<br>2) Moves towards closing first floor reception desk |
| 4 | Electoral Registration & Committee & Admin | 1) Tests big incoming mailbag traffic procedures<br>2) Close first floor reception desk |
| 5 | Design – Highways + Land & Drainage + Car Parking | 1) Move towards closing the 7$^{th}$. floor reception |
| 6 | Planning | 1) Move towards closing the 7$^{th}$. floor reception<br>2) Major service with continuing strong "expert" element |
| 7 | Environmental Services | 1) Move towards closing the 7$^{th}$. floor reception |
| 8 | Community Supp,Parks&Countryside, Sport&Rec | 1) Close fifth floor reception<br>2) First multiple service transfer |
| 9 | Shopmobility | 1) Re-locate to the Civic Centre<br>2) Low volume – but volunteers integrated into service |

| 10 | Revenues – Council Tax & Benefits | 1) Large service but contact centre should now be up and running with service handovers a routine matter |
|---|---|---|
| 11 | DSO | 1) First Routing/directing service – contact likely to be minimal |
| 12 | Property Services, Corporate Policy & Strategy, Land Charges, Legal Services, Economic Dev | 1) Low/No face to face – high number of non standard enquiries |
| 13 | Partner Access Channels | Tullie, TIC's Community Centres; Volumes are unpredictable |

59.

Action Plan-By Responsibility

Appendix C-3