

# Report to Business & Transformation Scrutiny Panel

Agenda Item:

**A.3**

Meeting Date: 03 October 2019  
Portfolio: Communities, Health and Wellbeing  
Key Decision:  
Within Policy and Budget Framework  
Public / Private Public

Title: Customer Services Update  
Report of: Customer Service Manager  
Report Number: CE.05/19

## Purpose / Summary:

The purpose of this report is to update the panel with ongoing work within Customer Services including, current performance, upcoming improvements and ongoing actions. This report also satisfies the panels request for ongoing updates following reports CE 08/18 & CE 03/19.

## Recommendations:

Please could you support the following:

- The Contact Centre to open at 8am (Calls Only) upon completion of training
- Updated phone system as part of the wider telephony upgrade
- Transferring operational documents to cloud storage
- Implementation of more structured individual performance measures

## Tracking

Executive:	
Scrutiny:	
Council:	

## **1. BACKGROUND**

- 1.1** The consultation for the adjustment of current resource this has successfully taken place. Current staff have had their working hours altered to align with customer demand following the scrutiny of peak level and working pattern reports (Appendix A&B, Report CE 08/18). Q1 has seen significant gains following our new structure going live on 01 April 2019 (See appendix A).
- 1.2** We have increased our front-line advisor headcount by 1.5 full time equivalents (FTE). This has been split into 3 part-time roles to allow greater headcount during busy periods whilst avoiding surplus requirement during quieter periods. Our restructure removed a layer of management which funded the majority of advisor growth along with increasing our supervisory capacity.
- 1.3** 8am opening has also successfully been through the consultation process and is now ready to action. Training is specialist and requires approximately 9 months to fully train an advisor on all service functions. It was anticipated that we would begin 8am starts in September 2019 but this has been delayed by staff movement. This has now been remedied by promoting staff members within the team and back-filling posts by recruiting externally. We now have two new advisors and a stable supervisor team. As previously stated, 8am opening hours must have the whole Customer Service team trained to a specific level for us to appropriately cover the required specialisms. I anticipate we will be in a position to go live by April 2020.
- 1.4** Our 2018/19 service plan outlines the need for improved staff training and development to shorten the time it takes to fully train an advisor and increase our accuracy. We have developed a new performance management strategy which goes live on 01 October 2019. This consists of one-to-one meetings every month to discuss an individual's performance against our targets. Improvement aims will then be put forward and monitored every month. These regular meetings will identify training needs, not only on an individual level, but spot patterns across the department. There is also a focus on wellbeing which will proactively identify any professional or personal issues that may affect a person's ability to carry out their role. We have processes that link into the many employee support initiatives provided by Organisational Development. It's an opportunity to provide personalised support for people who may be going through a difficult time, which is more effective than performance management in a team setting.

- 1.5** In March, the Business & Transformation Scrutiny Panel asked that the possibility of the qmatic queue management system being installed before the ground floor refurbishment was further investigated. This was following issues with accurately reporting footfall and general management of contact centre resource. We are pleased to report that we have now placed an order for the qmatic system and have completed the project initiation meeting on 09 September. The 'Go Live' date has been set for 14 November. The system itself is far more advanced than the version we had in 2015. It's fully hosted which means the 'brains' of the system is off-site and maintained by qmatic. This has advantages for both business continuity and the cost of maintaining onsite networks and servers. Should we suffer another flood, there is only two pieces of hardware that need moved to safety, which is a simple process. Additionally, it can be easily moved to the refurbished ground floor at no cost as the required networking is already part of the ground floor plan. Qmatic have also cornered the market for contact centre solutions and are able to offer significant discount to local authorities. It is over 70% more cost effective than in 2015. This will have a huge impact on how we can deploy Customer Service Advisors across the contact centre and phone rooms. This also gives us the ability to report queuing times and interaction times accurately.
- 1.6** We have developed a new Information Point using Microsoft SharePoint. This is an amalgamation of all the information Customer Services need to answer each query we receive. This is a live application that is updated numerous times per day meaning that advisors always have up to date information. Crucially, the information is stored off site on secure Microsoft Servers. This is a huge step in improving our resilience in the event of future flooding. The capability of SharePoint has also been extended to incorporate GDPR Compliance and document management. We have automated several processes and workflows to free up time to focus on training, accuracy and resource management. This will ultimately improve our performance. We have also utilised Microsoft Teams to manager our rotas. This is effectively an on-line rota with additional functionality that allows us to contact our advisors via group chat and video calls. Again, this functionality is in place for business continuity. Microsoft Teams and SharePoint are new online tools that are already part of our Microsoft Licence, so there is no additional cost in implementing these applications. Our advisors can even use a secure application to access this information from home and receive notifications on their phones.
- 1.7** The review of the Customer Service Business Continuity Plan is well under way. This was a necessity as the employment of technology drastically changes our ability to respond in an emergency. Appendix 2 shows the huge steps forward we

have taken in the past 2 years to continually improve our response. This will be updated again to reflect the procurement of a new telephone system (see 1.8).

A new contact centre telephone system is being investigated. Our current system is beginning to limit our effectiveness, particularly in emergency situations. It also has reporting limitations. Modern telephone systems are extremely intuitive and provide a professional and efficient first point of contact for our residents and visitors. This is part of the wider Civic Centre telephone upgrade, so timescales are difficult to pinpoint. Any new contact centre phone platform must have seamless compatibility with our wider phone system which requires extensive research and testing. Other key requirements are the ability to access the phone system from home. This is to further enhance our business continuity (see appendix 2) and to potentially diversify how we resource Customer Services in future. Home working options are becoming a popular way to attract talent to an organisation. We will require the ability to monitor first time resolution and have Intergrations into our CRM system also. The correct solution will play a key role in improving how we interact with customers.

## **2. PROPOSALS**

- 2.1** It is proposed that work continues identifying efficiencies and improved resource management.

## **3. RISKS**

- 3.1** No risks have yet been identified.

## **4. CONSULTATION**

- 4.1** Reports and findings will be reviewed by the Senior Management Team with further consideration by the Transformation Board.

## **5. CONCLUSION AND REASONS FOR RECOMMENDATIONS**

- 5.1** Recommendations in this report are based on hard evidence and have the aim of improving customer service. Furthermore, the department will be structured for growth and resilience. Customer Service staff continue to show their hard work

which will be recognised further with improved call answering performance.

## **6. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES**

**6.1** The Customer Service Charter, and its aims, forms part of the upcoming corporate plan.

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**Appendices attached to report:**

**Appendix A - Quarter 1 Call Comparison**

**Appendix B - Business Continuity Actions**

**Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:**

- **None**

**CORPORATE IMPLICATIONS:**

**LEGAL -**

**FINANCE –**

**EQUALITY –**

**INFORMATION GOVERNANCE –**

## Appendix A – Quarter 1 Performance Comparison

Year (Q1)	Total Calls	Average Wait	Abandoned	Calls Within 1 Minute
2016/17	29,136	00:03:19	30%	47%
2017/18	28,344	00:02:58	23%	48%
2018/19	24,204	00:03:29	24%	41%
2019/20	23,041	00:02:36	18%	61%

### Total Calls

Whilst on face value it appears call volumes are rapidly falling; the reduced incoming call volume is heavily impacted by abandoned calls. Typically, customers who abandon their call will contact us again, each time becoming less patient, turning one abandoned call into several. For example, the reduction of abandon rates between 2016/17 and 2019/20 equates to 4758 more calls now being answered. In effect, call volumes have dropped by just over 1000 calls per quarter, which is to be expected following the success of our online services and it's 22,000 registered users.

### Average Wait

The average wait has decreased significantly. Again, this is attributed to an improved staffing structure during busy periods and streamlining processes.

### Abandoned Calls

Significant improvements have been made with abandoned calls, but the aim is to improve further. Abandoned calls for an organisation of our size is typically 8-12%. Our aim is to consistently achieve 8%. The average time to abandon for Q1 was 00:02:09 which is very close to our average time to answer, which is very encouraging. Our improved staffing structure has been responsible for these significant improvements and we expect to achieve 8% through the introduction of our performance management strategy as detailed in section 1.4 of this report.

### Calls answered within 1 minute

This is a new, challenging, target that is in progress. This is heavily impacted by our ability to speed up contact during peak periods which has been approached from a resource perspective. It is expected that our performance management strategy and the deployment of new technology will push us to this target.

### Other considerations

Our new staffing structure has been 'stress tested' during Q1 of 2019/20. Due to staff movement we have been understaffed throughout this period yet have still delivered the most positive Q1 results for the past 4 years. Q1 comparisons are a good baseline for performance as it contains main billing statistics, which is historically one of our busiest and most complex periods.

**Business Continuity Actions**

Identified Improvement	Starting Situation	Issue	Position Now / Plan	Resolved/ In Progress / Needs Action
<b>TIC phone lines</b>	Following the 2015 flood, the TIC is was used as an emergency contact centre until the temporary contact centre was made operational. This also served as a phone room	Limited lines were available which diminished our capability	The TIC will still be used as the emergency contact centre but the available lines have been increased so it will allow us to connect all of our advisors	Resolved
<b>Lost Workstations</b>	All workstations were desktop computers with a generic configuration.	Each workstation was lost in the flood requiring replacements to be found and configured	All advisors have been issued with laptops and can work from any workstation. Processes have been implemented were advisors take their laptop home if there is a weather warning. Laptops are personally configured so are immediately effective when switched on in the emergency contact centre	Resolved
<b>Phone Room</b>	The phone room was situated on the ground floor	Both the contact centre and phone room was lost after flooding	The phone room will remain on the 4th floor. Once building access is restored the phone room will be fully functional	Resolved
<b>Key System Accessibility</b>	Most operational documents are stored on internal servers	If the building suffers power cuts of severe flooding, internal drives are not accessible if the computer room is not functioning	All Custome Service operational documents used to handle phone calls are now externally stored and accessible from any internet connection using secure two factor authorisation via SharePoint. This is the same for our main CRM system. We will be able to handle most calls as usual regardless of internal system availability. There are some systems we use that still reside onsite, but workarounds have been developed.	Resolved / In Progress
<b>Document Handling</b>	Emergency documentation' was developed to log appropriate tasks which were actioned once systems were restored. This required a large amont of printing and data input.	Workload was doubled during an already exceptionally busy period.	Where possible, the most popular service requests are managed electronically using our hosted systems (Salesforce & SharePoint). This requires no printing and will forward any required actions once normal service is resumed. Documents that have not been fully digitalised are still available but on a use per case basis.	Resolved / In Progress
<b>Communication</b>	During an emergency, we were reliant on phone calls to organise resource.	This was time consuming for customer Service management and was open to error as we have a large team.	We have utilised Microsoft Teams which is not only an online Rota but has mobile functionality that allows us to contact all advisors at once. This platform allows us to communicate by group conversation, post updates and share documents very quickly. These notifications are accessed by phone and guarantees a consistant message accross the entire team. We can relocate resources without having to make several phone calls.	Resolved
<b>Planning</b>	During an emergency, advisors would await management instruction	This caused immediate delays as actions couldn't be done until a management decision was made	We are developing a quick guide for all Customer Service team members. Everyone will have access at any time via Sharepoint. We are also developing a small action plan card that will be stored on our lanyards behing our ID card. These will be specific to Advisors, Supervisors and Management. This is so we can proactively plan a quicker response in the immediate aftermath of an emergency	Resolved / In Progress
<b>Phone System</b>	The cisco phone system is an on site system reliant on our network. It also has limited functionality and cannot be used without being connected to our network.	Should the computer room be compromised, we lose our phone system, including the ability to quickly change the architecture to suit an emergency situation.	We are looking to procure a system that is also hosted and can be accessed regardless of the status of our internal network. Modern systems have the funtionality to proactively design the phone archetecture to suit an emergency situation which is only activated during an event. This can be done from any secure internet connection or by telephone. This is part of the wider Civic telephone upgrade	In Progress
<b>Asset Recovery</b>	Numerous sytems and hardware were lost after the floods of 2015	It's more challanging to recover if you have to find work-arounds or take the time to procure replacement systems	Part of our planning includes the protection of key assets and hardware. Any new or upgraded system must meet specific parameters. For example, our new Qmatic system is hosted and has two pieces of easily removable hardware. All essential hardware is accounted for and located accoring to weather warnings.	Resolved