

# Report to Business & Transformation Scrutiny Panel

Agenda Item:

**A.5**

Meeting Date: 4th January 2018  
Portfolio: Communities, Health and Wellbeing  
Key Decision:  
Within Policy and Budget Framework  
Public / Private Public  
  
Title: CUSTOMER SERVICES UPDATE  
Report of: Service Improvement Manager  
Report Number: CE 01/18

## **Purpose / Summary:**

### **1. Smarter Service Delivery Project**

#### Website & Salesforce

The purpose of this report is to update the panel on the work within customer services and in the main the Smarter Service Delivery (SSD) Project. The project was set up initially to meet customer expectations in being able to access City Council services 24 hours a day, 7 days a week online. Key officers across several service areas developed a transactional website that was optimised for mobile devices. An important part of this was to ensure seamless integration with back office systems which has been achieved with the use of web forms. This has allowed resources to be used in a more effective way with self-service users providing queries electronically, eliminating the need for officers to perform data entry onto back office systems where an interface exists.

Our website has continued to be a great success due to almost daily updates. Content is more current and easily accessible. We use website analytic tools to determine how certain pages are used by tracing the most common routes customers take when visiting a webpage. We can also monitor which browsers customers are using so we can ensure pages are compatible and user friendly. 'My Account' has seen a significant increase in the number of users to 17731 (as of 17/12/2017), an increase of over 3500 users from June 2017. This is largely due to prominence on the website with carefully designed user pathways. Additionally, an auto-reply has now been added to the Customer Service

mailbox which sets customer expectations regarding response times whilst offering a further prompt to sign up to My Account by use of a Hyperlink. We have worked closely with marketing to ensure the My Account brand is consistent and prominent. This extends to online content, email interactions, Carlisle Focus advertising and mailing. The My Account online dashboard enables users to apply for Council Tax discounts and exemptions, give details on moving property, setting up a direct debit along with various other Council Tax functions. Customers can sign up to receive their bills by e-mail (e-billing), view their housing benefit application, report environmental problems, access refuse & recycling services, access business rates accounts, submit a green spaces enquiry and submit a planning enquiry. There are now 36 separate online requests that fall under these services, 28 of which have integration directly to our back office systems, namely Salesforce.

The second phase of Smarter Service Delivery (SSD2) focuses on the installation of a Salesforce platform, which is moving at pace. All services that were using the original Capita CRM system have been successfully migrated to Salesforce with great success. Pest Control 'went live' in November 2017 following the integration of Waste Services, Council Tax, and Green Spaces, many of which are our biggest services from an interaction perspective. This transition represents a significant saving of £45,000 due to Salesforce being built in-house, with no ongoing service support costs. Interactions through Salesforce are increasing significantly due to the addition of services and the increase of self-service users through the My Account integrated web forms. Salesforce interactions for June 2017 were 979. In October this has increased to 2484.

We have been able to provide bespoke services and automated workflows to each integrated service thanks to the communication of the project team. We have learned from each piece of feedback and applied any lessons as work has progressed. Our emphasis has been on Customer Services ability to resolve as many queries as possible on the first point of contact whilst providing integrated services with accurate information to perform any needed actions, promptly and accurately. To achieve this, the advisors user interface is consistent across all service areas. This has enabled us to add additional services with minimal training as functionality remains consistent. Additionally, tasks that purely service led, ordering bins for example, has been automated so a query automatically raises a work order without the intervention of a technical officer. This frees up time to assist customers for queries of a more personal nature where personalised support and guidance is essential.

Customer Services hold monthly review meetings with all services that have been transferred to Salesforce. These meetings are extremely valuable, enabling us to continually streamline processes to improve the customer experience. Although waste

'went live' in September, we have recently automated the process surrounding the collection of waste receptacles that are no longer in use. This has significantly cut administration time and was as a direct result of a review meeting.

A Salesforce roadmap has been produced by ICT Services which outlines the planned rollout of Salesforce across the Council, which is under consultation. It is important to mention that this is a live document that is open to change to accommodate any future changes of priority.

It has just been confirmed that the SSD project has been shortlisted for an inetwork award for the category of Innovative Access for Public Services. The following link will provide further information on our submission.

<http://annualconference.i-network.org.uk/inetwork-innovation-award-finalists-2017/>

### Benefits – Risk Based Verification (RBV)

Customer Services are working closely with Benefits on the introduction of RBV. This is a proven tool that significantly reduces the administration of Housing Benefit claims. RBV assesses an application and applies a risk score which will determine what evidence is required before the claim is processed. This will focus resource on claims that are most likely to have intentional or unintentional inaccuracies reducing the costs associated with investigation and recovery of overpayments. On average, 50% of a local authority's case load is low risk, which will mean less resource is used processing large amounts of evidence, reducing processing days and improving customer satisfaction.

RBV is automated when a customer applies for housing benefit online using eclaim. For this reason, the primary way to apply for Housing Benefit will be by eclaim. Paper forms will still be in existence but only used for customers who have no way of completing an application online. Again, the use of online applications significantly saves on data input time, freeing resource to provide a personal service to the people who need it.

Customer Services will offer all of the support needed, which also prepares us for the upcoming Universal Credit Full Service go live date in July 2018.

## **2. Customer Contact Centre**

The customer contact centre face to face function is currently still operating from a temporary portacabin on the Civic Centre car park. Customer service staff have worked exceptionally patiently since the floods of December 2015. However, this building is very quickly becoming unfit for purpose.

The telephony part of the customer contact centre is situated on the 4th floor of the Civic Centre building. Therefore, the two elements of the service are being challenged to operate as efficiently as they could be. That said, the teams are currently meeting those challenges and this shows their true professionalism and enthusiasm for carrying out excellent customer service for residents and visitors within Carlisle.

Customer services have been involved heavily in the proposed reinstatement of the Civic Centre ground floor which is gathering pace. We have put particular emphasis on the support of our Smarter Service Delivery project and our capacity to work with other partnerships.

### **3. Partnership working**

These include Department of Works and Pensions Fraud Section and Cumbria Constabulary. Her Majesty's Passport Office staff carried out the passport interview service for first time adult passports. Passport staff were made redundant after the floods and that service ceased. However, customer services staff negotiated a new contract where customer contact centre staff carry out the service on their behalf. This involves remote links to the Glasgow office of the Passport service. This brings additional income into the authority of £50 per interview. Currently this equates to around £7,500 per month. This contract is set to continue as the Passport Office have committed to fit updated equipment and high speed connections in January 2018.

Cumbria Constabulary now have 'HUB' in the Civic Centre with the aim of bringing together key organisations to tackle anti-social behaviour and other safety concerns voiced by the residents of Carlisle. As the Council's first point of contact, we have created robust processes to refer any concerns to the 'HUB', which has proven very successful.

The upcoming Universal Credit rollout in July will also present a significant opportunity for partnership working. Our Smarter Service Delivery project has received praise from the Department of Work and Pensions (DWP) as it dovetails with the support we will provide claimants. We will be offering Personal Budgeting Support (PBS) and Assisted Digital Support (ADS) for any customers who are struggling with their finances or do not have access to online services. As customers are transferring from Housing Benefit to Universal Credit we can identify the support that is needed. Mechanisms are also in place to identify the most vulnerable in our society to be visited at home by the DWP. These additional services represent a sizable increase of income from the DWP although figures are still to be confirmed.

## Recommendations:

It is recommended that the Business and Transformation Scrutiny Panel endorse the proposals within this report of supporting further development of Salesforce CRM. This will combine the use of new and emerging digital service delivery to enable efficiencies as well as continue to meet ever changing customer expectations.

They are further asked to endorse the addition of partnership working opportunities to enable the Civic Centre to become a true community hub for Carlisle.

## Tracking

Executive:	
Scrutiny:	
Council:	

## **1. BACKGROUND**

- 1.1** The original Smarter Service Delivery (SSD) Project focused on the development of a transactional website that was optimised for mobile devices (Mobile first). The goal was to enable customers to self-serve when accessing City Council services.
- 1.2** Priority was based on services which created most public demand and wherever possible, end to end integration with back office systems and the current Capita Customer Relationship Management (CRM) system. A self-service portal was devised which currently has more than 17731, subscribers.
- 1.3** Following the success of SSD2, Salesforce will continue to be developed to incorporate services that were not part of the Capita CRM system. Further updates and improvements to already integrated services will continue to be ongoing.
- 1.4** Capita CRM is now being closed down following the integration of Pest Control onto Salesforce.
- 1.5** Web Form integration will continue to grow with each new service.
- 1.6** RBV expected to go live in early 2018. Customer services will support the transition from paper forms to online Housing Benefit applications.
- 1.7** Universal Credit support will be in place for customers with financial or digital inclusion difficulties.
- 1.8** Customer Services will continue to provide support for the proposed ground floor plan.

### **1.9 Service Design Method**

- 1.9.1** The below method was used for the integration of all services using Salesforce.



## Discovery

A short phase, in which you start researching the needs of your service's users, find out what you should be measuring, and explore technological or policy-related constraints.

## Alpha

A short phase in which you prototype solutions for your users needs. You'll be testing with a small group of users or stakeholders, and getting early feedback about the design of the service.

## Beta

You're developing against the demands of a live environment, understanding how to build and scale while meeting user needs. You'll also be releasing a version to test in public.

## Live

The work doesn't stop once your service is live. You'll be iteratively improving your service, reacting to new needs and demands, and meeting targets set during its development.

This method has proved to be successful and will continue to be used in upcoming integrations. Having a test environment before 'going live' has proved invaluable. Also, regularly reviewing the system with each service has given vital feedback that will be used to benefit future services.

## 2. PROPOSALS

**2.1** It is proposed to continue with the transfer of services through the service design method.

**2.2** The same integrated technology is to be used through My Account for each service

**2.3** A continued plan for partnership working when a permanent contact centre is in place, with facilities to support SSD.

### **3. CONSULTATION**

**3.1** Consultation has taken place with the Senior Management Team, the Transformation Board, Resources Overview & Scrutiny Panel and the Portfolio Holder for Communities, Health & Wellbeing.

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

**4.1** The report contributes to a number of priorities within the Carlisle Plan. It gives a more convenient and unified approach to enable access to Carlisle City Council services which will support the priorities across the plan.

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**Appendices  
attached to report:**

**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/RISKS:**

**Community Services -**

**Corporate Support and Resources –**

**Economic Development –**

**Governance and Regulatory Services –**