

Cabinet – 12 February 2020

Walsall Proud Programme – Customer Access Management

Portfolio: Councillor Bird, Leader of the Council

Related portfolios:

Service: Transformation, Walsall Proud Programme

Wards: All

Key decision: No

Forward plan: Yes

1. Aim

- 1.1 Improving customer experience is at the heart of the Walsall Proud Programme (WPP); as such, the council are developing ways of working that meet customer expectations and reflect changing demands for the future. The council has embarked on a programme of work in relation to how customers contact us and access the council's services. This will deliver significant improvements to customer experience, outcomes & efficiencies across the whole council.
- 1.2 The overall aims of the Customer Access Management (CAM) workstream are to:
 - Increase accessibility including use of digital channels so it is quicker and more convenient for customers.
 - Improve customer experience in how people interact with the council, with customers reporting a positive change.
 - Reduce unnecessary demand so employees can focus on service delivery and supporting those with more complex needs.
- 1.3 Delivery of the proposed changes to CAM will deliver against the council's PROUD programme objectives:
 - Improve outcomes and customer experience
 - Improve employee satisfaction and engagement
 - Improve service efficiency and performance

2. Summary

- 2.1 This report outlines the council's approach to achieve better outcomes and customer experience through the CAM workstream of the WPP. The work will also contribute to increasing staff satisfaction and engagement and improving service efficiency and performance.
- 2.2 This report is to inform Cabinet of progress made on the CAM workstream and the next steps the council will take to implement new ways of working.

- 2.3 The overall aim of this report is to provide Cabinet with a high level of confidence that the activities and outputs for the CAM construct project have been completed and the workstream is now ready to move into implementation.
- 2.4 This report outlines the council's approach to achieve better outcomes and customer experience through the CAM workstream of the WPP. The work will also contribute to increasing staff satisfaction and engagement and improving service efficiency and performance.

3. Recommendations

- 3.1 To note, the intention to implement a refined customer access and management model for the council, which has the ambition for a consolidated universal front door with some information gathering and initial assessment for more complex needs, which will be developed through a phased approach.
- 3.2 To note that the customer transformation is based on developing digital access by design, establishing a Customer Experience Centre supported by in-service improvements to customer management.
- 3.3 To note the approach for implementation, organised around five key components for CAM transformation ('Five Pillars' for CAM) which are defined in 5.9.
- 3.4 To note the implementation of the next steps for CAM transformation which commenced on 6th January 2020, which will be delivered working closely with other workstreams including 'Enabling Technology' and 'Outcomes, Service Levels and Delivery Models' as part of the Walsall Proud Programme.

4. Report detail – Know

- 4.1 CAM was established as a key capability for the council's future Ways of Working at the outset of the Walsall Proud Programme. The key CAM activities were then defined and designed in early 2019, as part of the council's functional model setting out how council activities will be organised in the future ways of working.
- 4.2 The CAM Detailed Design set the basis for the 'CAM Construct' phase of work, which has focused on:
- Creating an evidenced view of customer needs and experience, then defining the detailed principles and parameters for the future Customer capability, including a Customer Experience Centre (CXC) as a more centralised model for customer management.
 - Establishing an evidence-based methodology and programme plan for the initial set up and subsequent development of the Customer capability.
 - Documenting a blueprint with the requirements for implementing the Customer capability, including the first phase of the CXC.
- 4.3 Throughout the work, the council have engaged with a wide range of different stakeholders about current challenges and how the council can deliver better customer experience and outcomes as a council - with ideas from frontline employees, Members and managers. Key challenges include:
- Customers are uncertain about who to contact when, with a lack of clarity about what happens next;

- There is an inconsistent and fragmented customer experience across the council with pockets of good practice but customer journeys which are not connected or co-ordinated;
- There is limited confirmation or record of contact with the council and mixed expectations about timeliness of response;
- Many employees are doing some customer access and management tasks which includes additional administration and diverts them away from delivering services.

This engagement has contributed particularly to the development of Future Ways of Working which sets out the future Customer model, as well as the overall Blueprint.

4.4 In addition, research was undertaken with external customers through a series of focus groups and an online survey. Key conclusions from the analysis include: Choice of contact channel is driven both by digital capability and the strength of the emotion within the transaction (how urgent / important it is perceived to be).

- Customers are not expecting to be surprised or delighted with service levels, but they do have basic needs when completing a transaction with the council, which are not always met.
- The website is being used by many as a telephone directory, with customers turning to the phone when they cannot complete tasks online.
- There is appetite for more transactions to move online across all age groups, but especially younger people.
- However, customers have relatively low trust that online interactions would be dealt with in full currently.

Additional engagement and research continues to be undertaken with customers with protected characteristics, supported by the Equalities team, to inform future ways of working.

4.5 A Customer Transformation Steering Group, consisting of representatives from each directorate chaired by the Corporate Management Team Sponsor for the workstream, has met on a regular basis to review findings and proposals for CAM. It will continue to play an important role in implementing and embedding changes as part of the ongoing transformation activities.

4.6 The Council needs to transform across digital, phone and face-to-face channels helping customers to access information and resolve queries at first point of contact as far as possible, while ensuring those with additional needs get the support they require. The proposed changes for Customer Access and Management are about ensuring use of channels and ways of working are effective, connected and efficient.

5. Council Corporate Plan priorities

5.1 The Walsall Proud Programme is fundamental to the successful delivery of all priorities, particularly on improving customer's experience, employee satisfaction and an internal focus on efficiency.

6. Risk management

- 6.1 Effective governance arrangements are in place for the Walsall Proud Programme to allow for successful delivery of the programme. These consist of:
- Walsall Proud Programme Board, consisting of key senior officers,
 - Commercial Group,
 - Design Authority,
 - Customer Access & Management Steering Group

7. Financial implications

- 7.1 The Capital Programme includes investment for Enabling Technology totaling £11.7m for the Walsall Proud Programme, including support for Service Channel Management (telephony), and Customer Relationship Management technology required to realise the ambitions for Customer Access and Management
- 7.2 As well as improving the customer experience, this work stream is expected to deliver direct financial benefits in the region of (low range) between c£13m and (high range) c£18.5m.
- 7.3 Costs in relation to the customer experience centre and resource planning for delivery of the work stream will be required to be accommodated from within the overall investment budget established to support the programme.

8. Legal implications

- 8.1 Any legal implications will be identified as the Workstream progresses. These will be managed and raised where required with the appropriate governance mechanism as set out in 6.1.

9. Procurement Implications/Social Value

- 9.1 Any subsequent procurement required will be conducted in conjunction with the Council's procurement team, overseen by the Commercial Group, and approved by the Walsall Proud Programme Board.

10. Property implications

- 10.1 There will be property implications in relation to the development of a Customer Experience Centre which will be reported to the WPP Board as they emerge. These will also have implications for work within the Enabling Technology Workstream.
- 10.2 A location options report identified the options available and a recommendation to locate the CXC within the Civic Centre, ground floor. There will be associated cost of refurbishment, which will require a temporary Civic Centre location to accommodate interim phase 1 of the CXC whilst works are carried out.

11. Health and wellbeing implications

- 11.1 None

12. Staffing implications

- 12.1 The development of a new CXC will be at the core of how the customers of the council will interact with the council under new ways of working. To ensure the future organisation design enables an improvement in the quality of customer experience and outcomes, a number of staff members will be affected. To establish interim state 1, it is modelled that 35 – 50 FTE will be required to operate from the CXC.
- 12.2 For phase 1, this will include relocation of 15 current call handlers from Pelsall Road Depot, Economy & Environment Contact Centre and corporate switchboard, to the Civic Centre. Further staff will be relocated from services in to the CXC. Staff will be identified at each stage of implementation.

13. Reducing Inequalities

- 13.1 An equality impact assessment is in place for this workstream which will be continue to be reviewed where necessary and considered as part of the decision making process.

14. Consultation

- 14.1 Following Cabinet approval on 23rd October 2019, the CAM team has completed consultation through Member workshops, customer focus groups, operational workshops, manager workshops and an online survey.

15. Decide

- 15.1 The creation of a council-wide Customer Access & Management capability is a core part of the council's future functional model. Its purpose will be to ensure a consistent approach to managing customers and providing customers with a positive, high quality, customer experience.
- 15.2 The CAM Blueprint sets out how a holistic transformation is required across digital channels, a new Customer Experience Centre (CXC) and in operational service areas in order to reduce unnecessary demand, enable a sustainable shift to lower-cost channels, improve customer-facing processes and make the best use of council resources.

Customer Experience Centre

- 15.3 Robust foundations will need to be built first, with the CXC expanding its capabilities over time. A core function will therefore be established in phase 1, with the aim of going live in June 2020, with ongoing development and transition of responsibilities in conjunction with service transformation to ensure improved end-to-end customer journeys.
- 15.4 Operationally the CXC will be responsible for a range of customer-facing processes across the council - it will seek to handle these as far as possible but handover or work in partnership with services where needs are more complex. The initial scope of operational responsibilities for the CXC is set out as a result of the CAM Construct work.

- 15.5 In its first phase, the CXC will primarily focus on managing customer contact through telephone and email channels for simple enquiries and requests. As the CXC matures and enabling technology is implemented, it will offer a more integrated experience.
- 15.6 In its first phase, the CXC will consist of generalist multi-skilled operational teams (built around service families), with additional specialisms being included in future phases as it takes on more complex processes (including assessments).
- 15.7 The CXC will also include customer enablers to drive customer insight, build shared practices and a customer-centric culture, support continuous improvement and embed the voice of the customer in how the council operates. This will need to be driven by leaders and managers, supported by dedicated resources to be able to build capabilities across the council.

Implementation approach – Five pillars of CAM transformation

- 15.8 However, the CAM Construct work has emphasised how the CXC is just one part of the solution for successful Customer Access and Management transformation. Improved customer experience and outcomes, as well as the ambition for greater efficiency across the council, requires holistic change across all channels.
- 15.9 To deliver this, therefore, the CAM Blueprint sets out ‘five pillars’ of customer access and management to be transformed:
- Establishing a council-wide Customer Experience Centre to resolve queries and issues at first point of contact.
 - Investing in a Customer Relationship Management system to support more integrated services for customers.
 - Redeveloping the council’s website so customers can access the information they need and better self-serve.
 - Driving improved customer culture and behaviours alongside outcomes and service transformation across the council.
 - Delivering rapid improvements to customer-facing processes so that the council can immediately improve customer experience and outcomes while the longer-term changes are being prepared and implemented.
- 15.10 The implementation plan in the CAM Blueprint provides the roadmap for CAM transformation, built around these five pillars. It sets out the required change, what good looks like and key delivery activities around short, medium and long-term milestones. For each pillar, further detail is then provided on the activities, steps to be taken and anticipated timescales in the short term.

Wave 1 of implementation

- 15.11 In order to manage change on this scale, the council will take relevant groups of services and customer-facing processes and transform them in turn. As far as possible, this will be undertaken in alignment with service transformation.
- 15.12 Changes to customer-facing processes will involve one or more of the following:
- Service offer or process improvement within the service area
 - Transfer into the Customer Experience Centre to manage the initial point of contact, transferring to service areas if required

- Digital transformation so the process can be conducted online or through a lower-cost digital channel (with alternative access if customers are unable to use digital channels)

15.13 Phase 1 of implementation focuses on establishing the first phase of the Customer Experience Centre, building momentum and foundations for further transformation.

This phase covers simple, high volume customer facing processes, based on the prioritisation criteria identified and data collected through the CAM Construct work. It takes a pragmatic approach that enables change to be progressed while the foundations for more technology-enabled transformation (including use of CRM) are established.

16. Respond

16.1 The CAM Team will:

- Establish appropriate resourcing in order to deliver the changes required in the next phase by January 2020.
- Determine the organisational approach to planning, preparing for and delivering consultation in relation to CAM and wider service transformation.
- Prepare to implement phase 1 of the Customer Experience Centre by June 2020, including determining the location.
- Mobilise the website transformation project.
- Progress and implement the Service Channel Management, (telephony), and Customer Relationship Management technology required to realise the ambitions for Customer Access and Management.
- Deliver a rapid process improvement approach to address a range of opportunities identified through engagement with Customers, Members and council employees, which are not dependent on technology.

16.2 It is anticipated that the Customer Access & Management workstream, as part of the Walsall Proud Programme, will continue to deliver agreed outcomes in accordance with the set governance arrangements.

17. Review

17.1 Monitoring, review and reporting progress of the CAM workstream will continue to be undertaken through current Proud governance procedures.

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