



## Report to Overview and Scrutiny Management Committee 19<sup>th</sup> April 2018

**Report of:** James Henderson, Director of Policy, Performance and Communications

**Subject:** Customer Experience progress report

**Author of Report:** Martin Riggall, Head of Digital Services  
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### Summary:

This report sets out progress on the Customer Experience Strategy over the last twelve months. It focuses on two particular aspects, namely the development of the Council's online services; and changes to the council's Customer Contact centre. It is being presented to OSMC following a request for an update following an initial presentation received by the committee on 1 December 2016.

**Type of item:** The report author should tick the appropriate box

Reviewing of existing policy	
Informing the development of new policy	
Statutory consultation	
Performance / budget monitoring report	
Cabinet request for scrutiny	
Full Council request for scrutiny	
Call-in of Cabinet decision	
Briefing paper for the Scrutiny Committee	X
Other	

### The Scrutiny Committee is being asked to:

Provide feedback on current work and planned work

### Background Papers:

Customer Experience Strategy

**Category of Report:** OPEN

# **Customer Experience Programme – Update Report**

## **1. Introduction/Context**

- 1.1 This report sets out progress on the Customer Experience Strategy over the last twelve months. It focuses on two particular aspects, namely the development of the Council's online services; and changes to the council's Customer Contact centre.
- 1.2 Overview and Scrutiny Management Committee received a report and presentation on the Customer Experience Programme on 1 December 2016. That report set out the ambitions and goals of the programme, which can be summarised as delivering an improved customer experience through:
- making sure that we get things right first time for our customers when they contact us;
  - ensuring that there is a consistent experience for customers regardless of which service they are using or which 'channel' they are using (e.g. phone, website, face to face)
  - reducing avoidable contact by seeking to resolve issues quickly and to the customer's satisfaction
  - making a proactive offer of services, by using our knowledge and intelligence to identify where a customer might benefit from using another SCC service (e.g. if somebody has contacted us about a blue badge application, also asking whether they would want to apply for an assisted bin collection)
  - using intelligence-led design to ensure that our services are designed around the needs of our customers rather than what is easiest for services
  - having a single view of the customer across systems and services
  - promoting self-serve first, recognising that most people want to deal with the council on-line in a time and place that suits them, whilst maintaining other channels for customers who do not want to or are not able to use online services.
- 1.3 The expected benefits of the strategy are two-fold. Firstly, we seek to significantly improve the experience that customers have of accessing customer services – we know from our research that prior to the strategy people were often unable to access services in the way that they wanted to, leading to significant frustration. Secondly, by getting the Customer Experience Strategy right, we can support the delivery of wider change within the organisation and contribute to the delivery of savings through being able to provide lower cost routes to service; by creating new online services to reduce the need for manual intervention; and by avoiding failure demand when a customer tries to access a service online and cannot.
- 1.4 Since that report to OSMC, significant work has been undertaken on delivering the approach set out in the Customer Experience Programme.
- 1.5 The first stages of work have focussed on updating some of the core infrastructure required to deliver the level of service that customers expect. The legacy infrastructure that had been in place would not have been capable of delivering the sort of change that the strategy envisaged. A significant part of this was the new infrastructure for the Sheffield City Council website and the ability to offer an in-house capability to develop our digital presence and begin to deliver end-to-end online, transactional services.

- 1.6 The programme also outlined a number other key capabilities which would need to be introduced for us to meet our customers' needs.
- 1.7 These key capabilities are essential enablers for other corporate programmes such as the Place Change Programme and the Improvement and Recovery plans within Adults' and Children's Social Care.
- 1.8 Over the last year, and as part of the wider Customer Experience Programme, there have also been significant changes within Customer Services, including the insourcing of the 101 service into the Repairs and Maintenance contact centre. This report also sets out the progress that has been made in this regard.

## **2. Progress to date and future plans**

- 2.1 This report is intended as an update on the progress of some of the key aspects of the Customer Experience Programme, current work which is being undertaken and our plans for the near future.

### **2.2 Work completed to date**

#### Improvements to Customer Contact centre/insourcing

- 2.2.1 In April 2017, following the Kier insource, Customer Services successfully established an out of hours contact centre – based at the Manor Lane site - for emergency repairs and problems with lifts. Having put this capability in place it was then decided to seek to insource some of the calls being dealt with by South Yorkshire Police's 101 service. Calls in scope included homelessness calls, calls concerning vulnerable adults and children and anti-social behaviours relating to SCC properties and premises (this latter category directing callers on-line). This insource was effective from 1<sup>st</sup> February and to date on average 96% of all calls have been answered (against a KPI of 85%) and feedback about the service has been very positive. The service is being delivered for £50k per annum less than the sum being paid to South Yorkshire Police for taking these calls. Customer Services plan to speak with other services about whether they could benefit from having out of hours calls taken by the contact centre.

#### Implementation of new Digital Services capability

- 2.2.2 A new Digital Services team was formed within the council to take responsibility for the systematic, planned development and delivery of digital services, which was previously undertaken in an ad hoc way across the council.
- 2.2.3 This multi-functional team has a focus on user engagement and developing our online offer to be in tune with user needs. The team also contains the skills to be able to design and build new capabilities for the Council to be able to offer services in the way which our customers expect them to be delivered.

#### Implementation of the new Council website

- 2.2.4 In April 2017 the Digital Services Team implemented the new Council website; this gives the Council a new state of the art online platform and was designed together with Sheffield citizens with an in-depth piece of user experience work which directly informed the design, structure and functionality of the site. Whilst

there is still much work to be done in improving our customers' online experience this gives us a solid basis to build on for the future.

#### 2.2.5 Improvements to the site included

- 'Responsive design' site, meaning you can access the site from any device
- New smart search functionality allowing a higher degree of accuracy for searches on the site as well as predictive functionality , getting citizens to the content they want more easily
- New site structure, informed by Sheffield citizens – aligning the site to how people view the Council rather than the organisationally focussed structure before.
- New clean modern design with standardised layouts promoting consistency across the site.
- Increased focus on transactions, with main actions highlighted so a user can easily complete tasks they came to do.
- A new set of digital standards and guidance for council officers ensuring they focus on the customers' needs when creating content

#### New online forms capability, allowing us to transact with customers online

2.2.6 In March 2018 we began to release our new online forms capability, which is the first of the new transactional capabilities of the site. This will allow customers to make requests, reports, applications and contact with the Council 24 hours a day, 7 days a week on a device they choose. The first eight services to make use of this new capability are within the Place portfolio, and cover areas such as fly-tipping, graffiti reporting, reporting of dangerous litter (e.g. needles or broken glass) etc. The forms are fully integrated with Amey's back office systems (see below) meaning that once a customer has reported an issue the job is booked automatically without any further need for manual intervention.

2.2.7 We are currently in a 'beta' period meaning we are introducing this functionality to the site with a high level of monitoring and scrutiny by the team.

- Online forms will allow for focussed information capture from customers, meaning fewer contacts and a more streamlined experience.
- Easy to build smart logic within the forms will allow us to assess things like entitlement to free or reduced-cost services online giving us the ability to get things right first time for the customer.
- Form data has been standardised in line with the data standards set out in the Customer Experience Strategy. Increased data quality with functionality such as address lookups will help officers to process requests in a more timely way than they can at the moment.
- Forms follow optimised 'service patterns' which have been informed by user testing. This should mean that the way in which services are designed online feel intuitive and easy-to-use for customers because they have been built around how people actually interact online. This should reduce people giving up half way through filling in a form or not being able to find the information they need.
- Designed to be 'mobile first', our new online services not only display properly on mobile phones and tablets (which are increasingly the sorts of device that people use to access the council's website) they use the

functionality of these devices, such as location services, to ensure transactions are as seamless as possible.

- Our website and forms are fully accessible, complying with the latest standards to promote use by customers who use adaptive technologies such as screen readers as well as the latest government digital standards.
- Completely secure, our forms comply with the latest security standards, ensuring that customers' personal information is secure and offering them peace of mind.

#### Integration with our core customer contact system, our mapping system and our highways partner Amey

2.2.8 One of the main issues with the previous site was that we were unable to offer fully end-to-end online services. The small number of forms that were on the old site resulted in an email being sent to an officer for intervention, resulting in delay for the customer and potential for error as data is rekeyed from one system to another.

2.2.9 Therefore, integration with our line of business systems is a key capability for allowing end-to-end digital transactions for our customers, enabling them to fully achieve fulfilment online with no further contact. This will also allow council officers to act on requests instantly with no dual keying into council systems and build up a picture of a customers' activity regardless of their method of access allowing us to better understand their needs.

- Customer data entered online is matched to our core customer database which is a step towards a single customer record
- Automated workflow allows a customers' submission to be routed to the right officer to deal with their enquiry or fulfil their request.
- Fully re-usable integration will allow us to build any number of online processes without the need for expensive development.

#### Creation of an innovative user testing suite

2.2.10 One of the core elements of our approach to designing new online services is to involve customers and service users in the process. We are using innovative tools to help us to create an approach to user research and testing which are at the cutting edge of the User Experience (UX) industry and have been used in combination with traditional research, interviewing and workshopping techniques to inform site improvements.

2.2.11 These techniques are currently being used with Sheffield citizens to explore the Adult Social care area of the website. We believe that this approach is unique within local government, and will help to ensure that we design services that work for the people who will use them.

### **2.3 Work in progress**

2.3.1 Whilst we have made good progress in the past year, there is a significant amount still to do to achieve the vision set out in the Customer Experience Strategy. Although we know have some of the core capabilities in place, others are still be delivered, and even once these are in place, there is significant work

to do to exploit these capabilities to create the sorts of digital service that our customers expect of us. Work is under way to secure an upgrade to SCC's Customer Relationship Management (CRM) system and this will significantly enhance the way in which information about customers and their queries is recorded and used. The new system should be in place from April 2019.

The following items are currently being worked on by the Digital Services team.

#### Enhanced online payments and e-commerce functionality

- 2.3.2 Our current online payments solutions are out of date, have no interactivity with our website or digital services and in many cases have a 5 day delay before we receive money against customers' invoices or accounts.
- 2.3.3 We have been working together with our partners to design and specify new modern online payments functionality which will, in summary:
- Allow more seamless payments, being able to pay online for more services at the point of access
  - Access balance information (e.g. for Council Tax or housing rents) on a device of the customer's choice quickly and easily
  - The ability to set up direct debits or recurring card payments online making transacting with the Council hassle-free
  - Integration with our back office systems meaning less officer time when reconciling payments
  - Offer new ways to buy services from the council such as catalogues and shopping baskets

#### Customer accounts

- 2.3.4 Customer accounts are an essential capability specified within the Customer Experience Strategy. We believe that the number of contacts that a customer has with the Council can be reduced by having a single place to check account balances, check the progress of requests or applications, and manage direct debits and personal details.
- 2.3.5 The work currently ongoing will put core account functionality in place and will allow users to sign in to the website to check rent and council tax balances in a single place. This will then be extended to other functionality.

#### Full user-focused content reviews across sheffield.gov.uk

- 2.3.6 Upon the release of the new site content was improved to a certain extent however is still not to the standard which many of our customers expect. We are working to review all of our content and functionality across the site.
- 2.3.7 A current ongoing piece of work is with Adult Social Care and represents one of the many activities being undertaken as part of the Adult Social Care Improvement and Recovery plan. We have been conducting user experience interviews and users testing with members of the public in order to completely recreate this area of the site.

#### Integration with further line of business systems

- 2.3.8 As explained above, having integration with our key back office systems is a critically important part of our ability to provide seamless, end-to-end online

services. Our plan is to enable functionality between a number of council systems and the website, starting with 'Confirm', which is used by many of our services within the Place portfolio. This is a key enabling activity for the Place Change Programme and will allow their customers to receive full end-to-end experiences online.

- 2.3.9 As well as offering a more seamless and convenient experience for customers, interactivity with back office systems and our digital services are an essential part of planned savings efficiencies within the Place Change Programme. By using intelligent workflow and our new online infrastructure it will be possible to reduce the number of inefficient and error-prone manual back-office processes that are currently operating.
- 2.3.10 A pilot is being started with the pest control service, with development due to start in April. This pilot will help us to develop this capability to the benefit of many services across the Council.

#### New online recruitment

- 2.3.11 Although we have already released some job advertisement functionality on the website, we are developing a new online recruitment service which will allow candidates to apply online and track their applications. This will utilise some of the functionality which has already been delivered such as forms and systems integration.
- 2.3.12 The advertisement functionality has been very successful in driving traffic to our site as our jobs are available to search engines such as Google for the first time, which has made vacancies much easier to find for prospective candidates. We have also run online campaigns for family social workers which have helped generate interest in this area.
- 2.3.13 Together with a renewed marketing strategy our online recruitment process will make it simpler for prospective candidates to apply bringing in much needed skills to the organisation with the goal of reducing reliance on costly agency staff.

#### Online bookings and reminders

- 2.3.14 The ability to book appointments online and receive text message or email reminders will again help to streamline processes giving the customer the ability instantly to complete the task that they came to the website to do (currently, for all services, customers cannot book appointments online and therefore need to call the contact centre/go to First Point or wait for a call back from another officer). The reminders capability will help reduce time wasted due to missed appointments.
- 2.3.15 Again this work is being planned initially to support the Place Change Programme but will be capable of being reused to the benefit of a large number of services within the Council.

#### New council intranet

- 2.3.16 Our internally facing intranet site is being replaced as the current software is out of support and does not meet the needs of our staff. To avoid additional cost, the intranet will be moved to the same Adobe platform as the website is hosted on. The new intranet is being designed with council staff and will be easier to

navigate with new functionality to allow them to do their jobs more quickly and more easily.

- 2.3.17 The new intranet is being specified, designed, developed and maintained by Sheffield City Council staff with no additional investment required and represents significant cost avoidance of around £400,000 if we had used an external organisation to do this on our behalf.

## **2.4 Future planned work**

- 2.4.1 As well as the work in progress documented above, we also have a number of longer-term pieces of work that we are planning or scoping:

### Alignment, replacement or integration with our online estate

- 2.4.2 A number of services which are offered online use separate ICT solutions than our website. Some good examples of these are:

- The [democracy.sheffield.gov.uk](http://democracy.sheffield.gov.uk) site which publishes details of councillors, MP's and publishes council meeting minutes and agendas
- The Sheffield Directory which is used for community services for special educational needs and Adult Social Care
- The Sheffield Property Shop which advertises social housing availability

- 2.4.3 These sites and others all need an individual approach which gets this right for their users. We are working with the respective services to put together a plan to ensure information contained in these sites is easily accessible through the main council site and that the transition is handled seamlessly.

- 2.4.4 The improvements to the CRM system referenced above will also trigger a move towards getting as many services as possible using this system; going forward this will include the recording of complaints and potentially member enquiries.

- 2.4.5 The proposed upgrade of SCC's telephony system allows for significant enhancements for people calling the contact centre. This includes intelligent queuing systems whereby callers can be told where they are in a queue and an estimate of when they can expect their call to be answered. A further potential enhancement includes a live chat element whereby people can hold real-time text conversations.

## **3 What does this mean for the people of Sheffield?**

- 3.1 The initial research carried out by the Customer Experience Programme indicated that although there were many positive experiences with the council our digital presence was severely lacking.
- 3.2 The impact of this is that in accessing services people are forced to use less convenient and poorer value channels such as calling us or contacting us in person, even though in our research as many of 50% of customers who contacted us by phone expressed a preference for online services.
- 3.3 Over the next 2 years the public should see substantial improvements in our digital services, have the opportunity to get involved with the development of these and will begin to be able to interact with the council in a new, more modern way as set out within the Customer Experience strategy.

## **4. Recommendation**

### **4.1 Overview and Scrutiny Management Committee is asked to:**

- Note the contents of the report
- Comment on the progress made to date and future planned activity
- Consider whether members of the committee would wish to use their knowledge and experience to help with the development of the site, and in particular to utilise their connection with their wards and communities to ensure that the site is in touch with user needs as possible.

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