

CUSTOMER SERVICE STRATEGY 2015 - 2018



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I. FOREWORD

I am very pleased to publish Plymouth City Council's Customer Service Strategy 2015 – 2018 which sets out how the Council is going to improve services for all of its customers. The improvements outlined to customer service in Plymouth, and tailored to the needs of Plymouth's customers, are vital in ensuring Plymouth City Council achieves its aspiration to be the 'Brilliant Co-operative Council' and also the City's vision to be 'one of Europe's most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone'.

The new location and improvements delivered in the new 1st Stop Shop demonstrate Plymouth City Council's commitment to improving access and delivery of customer service to all of its customers. The 1st Stop Shop will enable customers to become more aware, knowledgeable and confident in accessing services in more modern and digital ways, whilst also continuing to provide comfortable and appropriate interactions to customers who need a more personal and confidential service.

The modern way of delivering customer service is changing across all sectors and Plymouth City Council is becoming more innovative in its service delivery, as customers seek online and accessible 24/7 services. This strategy acts as a key document in enabling Plymouth City Council to better understand its customers' needs and expectations, and enables the Council to meet the challenges of delivering services in a more digital age.

Accompanying the strategy is a Blueprint and roadmap for change and an implementation plan of how Plymouth City Council will deliver the strategy's goals and objectives. I look forward to seeing this strategy being implemented over the next three years and welcome the positive outcomes that Plymouth's customers will receive through improved customer service.

Councillor Peter Smith
Deputy Leader of Plymouth City Council

2. EXECUTIVE SUMMARY

Plymouth City Council as the local authority for the City of Plymouth provides services and information to many of the areas 250,000 residents as well as businesses in the city and visitors.

Plymouth City Council is currently undergoing a significant change to the way it provides those services both in response to both ongoing budgetary pressures to its Corporate Plan 2013/14 – 2016/17, which outlines an aspiration to be a ‘Brilliant Co-operative Council’.



Figure 1: Our Plan: The Brilliant Co-operative Council

An area that has been identified as needing significant change to help realise these goals is the way that the Council interacts with customers. To address this change requirement the Customer Service Strategy has been developed with a vision that ‘the services delivered by the council across all contact channels will be efficient / cost effective in meeting customer demands whilst seeking opportunities to exceed customer expectations’.

The Customer Service Strategy sets out the direction and actions to achieve the goal of improving:

- The way the Council serves its customers
- The way customers can interact with the Council
- The customer experience for those interacting with the Council
- Job satisfaction for staff enabling and empowering them to provide excellent customer service

- Service efficiencies

The Strategy presents the reasons why change is necessary, which can be summarised as:

- Inconsistent customer service standards across departments.
- A failure to adapt to changes in technology (e.g. the growth in mobile computing)
- The failure to capitalise on the national trend of customers to self-serve, meaning people are still mainly using more costly channels like face to face and telephone to interact with the authority.
- A failure to use existing self-service channels to their full potential e.g. not integrating these systems with back office systems.
- A failure to promote self-service options effectively to its customers.
- A tendency for services to exist in silos and not share information about customers with each other. This can result in customers needing to contact different services within the authority separately to relate the same information (e.g. a change in address).

The Strategy's three aims are outlined as:

1. To improve understanding of the Council's customers
2. To improve the way the Council serves their customers
3. To improve the way that the Council listens and responds to customers.

The Strategy uses a categorisation of interactions as either:

- Simple - a straight forward easy transaction
- Assisted - where the customer wants some guidance or to be shown how to navigate the transaction but will in time learn to do it themselves
- Complex - where the transaction is complicated, has many parts or is an emotionally charged transaction that needs additional face to face support.

This categorisation of interactions will assist the council in achieving channel shift. To achieve this channel shift will require that the Council's staff are trained in dealing with customers in a new way and they will need to be enabled to do this through the use of technology. The Council will also have to educate and support its customers to use these new channels through marketing with targeted campaigns, and provide support through the change.

3. INTRODUCTION

The Customer Service Strategy aims to assist in the delivery of improved customer access and service delivery against the aspiration to be the 'Brilliant Co-operative Council' through delivering improvements to service bundling, digital channel innovations and consistent service delivery against the values as follows:

- Bring **Pioneering** changes to customer service through reviews of services, engaging with customers, partners, staff and members to ensure that the designs emerging are innovative and fit for purpose in meeting the demands of self-service and customer needs;
- Support the **Growth** of Plymouth through delivering improved automation in the provision of services to customers, this will allow the Council to support increased customer demands for services without significant budget increases being required;
- Ensure that customer needs are understood and incorporated into the way in which services are provided in future. The programme will support the **Caring** outcome through the use of surveys and customer panels ensuring that customers are at the heart of decision making and working closely with our partners in health, housing and the voluntary sector to provide consistent information, advice and guidance.
- Increase the **Confidence** of staff working with customers by empowering them to design and deliver services that meet customer needs. The satisfaction with the service provided to customers by the Council will become a vital measurement of success for the Customer Transformation Programme and the Council.

3.1 A Local Context

The citizens of Plymouth have specific needs as to how they prefer to contact the Council and this Customer Service Strategy seeks to ensure that no individual, group or community is disadvantaged through a lack of access to Council services.

The key drivers for the Customer Service Strategy come from the Corporate Plan, the objectives of pioneering, growing, caring and confident emphasise the approach that the Council needs to take in order to meet the needs of its customers. Each of the four objectives provides motivation and inspiration for the three aims outlined in the strategy and will help drive its success.

Plymouth's wide and varied demographic will not accommodate a one size fits all approach and so it is important to be both inclusive and co-operative to achieve successful change. This will be achieved through employing tools such as customer insight and undertaking segmentation modelling, as well as checking and validating designs and proposals with representative groups of customers. The aim is to develop an in-depth and thorough understanding of the customers' needs and expectations. This greater understanding will allow improved delivery of services and increased and varied contact channels to the Council's customers, and will provide the basis upon which we deliver a 'digital by preference' rather than 'digital by default' principle in the promotion of digital self-service.

Consistent with the rest of the country Plymouth is experiencing a growth in elderly and vulnerable customers presenting with needs that are time consuming for the Council and require relationships to be built with the customer and professional assessments made to ensure services meet the customer needs. Growth in demands from these customers is putting pressure on services provided face to face and over the phone. The Council also services nearly 120,000 employed customers, (16-64) workers, within Plymouth 51.3% who are qualified to a minimum of NVQ3 and above and 26.7% are qualified to NVQ4 and above. Demographic profiling of these customers as well as experience of

other Councils and service providers shows that they are likely to want to interact with the Council at a time and location convenient to them rather than have to visit a Council facility or call during opening hours to the Council contact centre. Currently they are severely limited by the number and ease of use of the self-service functions the Council is able to offer. The issues with the Council's current self service capability are forcing a number of customers into 1st Stop and the contact centre, these inappropriate and time consuming channels for these customers and expensive to support for the Council. By enabling and encouraging this population to 'self-serve' it will give Plymouth City Council time to spend with the more vulnerable customers within the community.

The successful delivery and promotion of online transactions promotes three of the Corporate Plans objectives;

- **Pioneering:** by designing and delivering better services that are more accountable, flexible and efficient in spite of reducing resources
- **Caring:** by promoting a fairer, more equal city by investing in communities, putting citizens at the heart of decision-making, promoting independence and reducing health and social inequality
- **Confident:** working towards creating a more confident city, being proud of what we can offer and growing our reputation nationally and internationally.

3.2 The Strategy's Supporting Themes

The Customer Service Strategy is supported by 5 themes shown in Table I.

Accessibility:	Locations and times which meet our customers' needs
Relevant:	Services that are fit for purpose, joined up and minimise potential barriers
Inclusive:	All customers are treated equally and fairly and customer feedback is acted upon
Quality and Efficiency:	Reliable, flexible and responsive services which are continuously improved and delivered cost effectively
Empowered and Effective Staff:	Ensuring our workforce that has the appropriate skills, tools, and authority to effectively deliver quality services.

Table I: Supporting Themes

Through these 5 themes we will demonstrate our commitment to the values of Plymouth City Council.

All service areas will need to apply the principles for Customer Service to their design during Transformation. This ensure that we implement the 5 themes above that will give us excellent Customer Service and our customers an excellent Customer Experience.

3.3 Principles

The Customer Service Strategy's aims and objectives have been established using the core customer service principles, outlined in table 1.

1	We will have a view of our customers across all services of our Council.
2	We will manage our customer experience across all services provided by our Council.
3	We will own the relationship with our customer.
4	Customer experience will be defined by the Council even where the service is delivered by a supplier or partner.
5	We will provide easy and convenient assistance in helping customers' access / get to the services that they need.
6	We will have a single view of customers and interactions.
7	There will be transparency for the supplier and the Council in transactions and interactions (where this legal and desirable).
8	As customer needs change we will be flexible enough to change to meet them.
9	We will minimise the number of interactions with our customer without compromising the service or the 'brilliant' experience.
10	All non-specialist customer service will be brought together in a single logical organisation.
11	We are committed to demonstrating the benefits of self service options for customers so that they choose to use them – digital by preference.
12	We will provide the appropriate tools, training and support to enable staff to deliver a "brilliant" customer service.

Table 2: Core Customer Service Principles

3.4 Why We Need a Strategy Now

This Customer Services Strategy will be used to explain how the Council plans on interacting with its customers. It details how customers want to make contact with Plymouth City Council and how that has changed in recent years through the rise in digital channels.

The Strategy will explain how the Council wants to improve on its current service delivery processes and discuss how opening up digital service delivery may be expected by customers and also be financially beneficial for Plymouth City Council.

Over the past few years the council has delivered services in a manner where customer satisfaction hasn't been improved, whilst also delivering an inconsistent service to customers across the multiple channels available. Additionally, budget reductions, and increasing service delivery costs have impacted the service efficiency. Moving forward, Plymouth City Council needs to deliver services that meet the customer needs and to deliver savings to reduce the deficit as well as to comply with government policy.

A Customer Service Strategy is required to outline the way Plymouth City Council will:

- Transform the way it interacts with customers
- Sets the standards that customers can expect when interacting with the Council
- Deliver services efficiently and cost effectively to all service consumers
- Align and coordinate the necessary changes across the council
- Respond quickly to changing environmental pressure, political pressure and social pressure

Without a strategy now the Council is only going to be able to make incremental changes with limited service improvement benefits and limited savings contribution.

3.5 Rationale for Change

3.5.1 Increasing the public value of services

In the traditional way of delivering services the Council uses contact channels such as Face-to-face, telephone, email and web but as technology advances there is more benefit and more people interacting with services through channels such as mobile apps and Social Media etc. This means that service users should be provided with increased opportunities to interact with council services online or through modern digital channels such as social media, as appropriate and in accordance with data protection legislation.

The approach in this strategy is to build the capability that meets the city's needs and improve the customer experience and it aims to achieve this by providing services through contact channels that are designed on the basis of customer feedback to best meet customers' needs. Working closely with customers to develop a real understanding of how customers want to interact with Plymouth City Council will create the opportunity to provide services through channels that best meet their needs and reduces the operational cost of service delivery.

Understanding customers, their needs and behaviour patterns in interacting with the council will ensure that funds are spent effectively in areas of value, and that services are relevant and easy to use.

3.5.2 Getting it right first time

Getting it right first time prevents avoidable / duplicate contact, which is an added cost to both the customer and the Council. Through delivering more streamlined and standardised processes the Council plans to reduce customer complaints and dissatisfaction. To achieve this, education and assistance will be provided to customers via both telephony and face to face contact channels in a bid to improve confidence to use digital services such as the web site as well as knowledge and understanding of the advantages it offers. An example of this approach can be seen in the new 1st Stop where the "self-service hub" will provide customers with an opportunity to use the web site to serve themselves in a location where trained staff are on hand to answer questions and support them through the process. Getting it right first time will allow the Council to record more accurate levels of demand, this will allow for more accurate scheduling of staff numbers and skills so that services are delivered consistently and with improved the customer experience.

Plymouth City Council will work co-operatively with internal services and customers to design processes that reduce the need for customers to make contact multiple times to complete a single transaction. Getting it right first time is what our customers want us to do, for example:

- notifying a change of address once, rather than contacting multiple agencies
- where customers are able to pay for school meals by multiple channels e.g. direct debit, web-pay etc. instead of by cheque each term
- chasing up progress on a reported incident or fault

3.5.3 Promoting Channel Shift

In encouraging customers to change their contact channel behaviours Plymouth City Council will adopt an approach that looks at encouraging channel shift using the five checks and balances below:

- **Volume:** Given the high fixed costs of creating self-service channels, moving significant volumes of customer transactions away from traditional expensive channels to self-service is important to repay the investment required
- **Standardisation of process:** to standardise and design processes and products that are fit for purpose and that can be used together to deliver improved customer service delivery.
- **Complexity of information:** Personal contact is generally more appropriate when dealing with more complex information as outlined in the Interaction Delivery Framework, Figure 4.
- **Need for the “human touch”:** Services requiring sensitivity or human judgement are more appropriately delivered in person.
- **The willingness and ability of customers to self-serve:** Customers have different capabilities and access to self-service channels.

These checks and balances will be used in line with the Interaction Delivery Framework, Figure 4, to ensure that all improvements made met customers’ needs and transactions are available to be completed using the appropriate contact methods for each transaction type.

4. HOW WE WILL EFFECT CHANGE

This section sets out what Plymouth City Council can do to achieve the goals and examines the propensity of Plymouth’s citizens to use services and channels differently. It also sets out how Plymouth City Council will develop the change, improving Customer Service and become more efficient and effective.

The Strategy sets out an indicative timeline for when services of certain interaction types could likely be moved to new channels and what the effect might be on existing channels at the same time. This indicative timeline is produced as Appendix C for Simple, Assisted and Complex interactions. At the moment Plymouth City Council handles most of its interactions with customers by telephone, face to face or by post with some enquiries and transactions handled via other channels such as the Web. The Council doesn’t have systems in place to accurately or easily measure how many transactions take place by what type or by which channel.

However, the Council does know that unlike in banking or retail it is not looking to increase its share-of-market or share-of wallet, it only has to provide services that its customers need or want. Plymouth City Council has to serve the vulnerable and needy as well as the affluent parts of society. It also has to be fiscally prudent with tax-payers money and ensure that it provides value for that money in the services it provides. So the Council needs to ensure that the services provided are as efficient and effective as possible, using the most cost effective channels dependant on its customer’s needs.

In the past Plymouth City Council has treated each service provision in a vertical silo that has required customers to have multiple interactions with the council in order to get the whole bundle of

services needed. By analysing the persona types who need bundles of services it will be possible for Plymouth City Council to provide a holistic approach to service provision. For example the individual who presents themselves with a housing issue is found to have just lost their job, needing housing/housing benefit, council tax benefit, enrolment at the Job Centre, free school meals for their children and so on. Rather than send them away to conduct multiple transactions, the Council will ensure that staff are able to identify all the needs of the customer as quickly as possible. Plymouth City Council's staff will be able to quickly assess eligibility and action the case quickly often at that first meeting to send the customer on their way relieved to have a resolution to the problem so quickly.

To achieve this approach the Council's staff will be trained in Customer Excellence, they will understand the customer and actively look for the optimum resolution to ensure a good Customer Experience. They will have access to technology that enables them to focus on the customer and quickly and seamlessly access eligibility checkers and information that the council already knows about the customer so as to minimise the number of times the customer has to tell us the same information.

To get this right Plymouth City Council has developed a Customer Service Framework.



Figure 2: Our Customer Service Framework

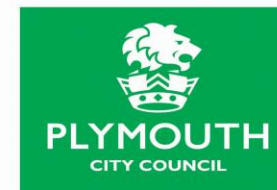
Using this framework to improve access and delivery of services to customers based on their needs the Council has developed three aims that the strategy is focussed on delivering. The three aims are:

1. Improve our understanding of our customers
2. Improve the way we serve our customers
3. Improve the way we listen to our customers

These three aims are outlined in the Customer Service Strategy 2015 – 2018 on page, and also explained further throughout the rest of this document.

CUSTOMER SERVICES STRATEGY

2015 to 2018



A key success measure for Customer Services is to deliver services which meet the needs of the people of Plymouth.

We aim to do this by establishing the foundation of understanding our customers better; and designing improved service deliver to better meet customers' needs

	AIM ONE Improve our understanding of our customers	AIM TWO Improve the way we serve our customers	AIM THREE Improve the way we listen and respond to our customers
WHAT WE WANT TO DO	<ul style="list-style-type: none"> ■ Better understand our customers' needs and preferences ■ Involve customers in the development of services, based on their needs, wants and preferences ■ Collect and hold securely, accurate and consistent information about our customers, where appropriate 	<ul style="list-style-type: none"> ■ Customer access to council services at times that suit their needs ■ Develop user-friendly, efficient digital access to the council 24/7 (e.g. via website / mobile apps) ■ Aim to address customers' needs at the first point of contact ■ Ensure a consistent customer experience is delivered ■ Explore the use of other locations around the City to deliver services in communities ■ Train staff to deliver a higher quality customer service 	<ul style="list-style-type: none"> ■ Ensure customer satisfaction is at the heart of everything we do by delivering customer-focused services ■ Increase customer satisfaction levels ■ Increase staff awareness of customers' needs ■ Reduce customer complaints and dissatisfaction ■ Consolidate and own complaints corporately ■ Learn from customer's complaints ■ Hold areas to account for complaints in their area
HOW WE WANT TO DO IT	<ul style="list-style-type: none"> ■ Implement a clear and consistent approach to gathering information about our customers ■ Redesign our services to give people more choices to contact PCC in a way that suits them ■ Generate and maintain a single record of the truth about our customers across the Council; a 'Tell us Once' approach ■ Involve customers in the design of services ■ Review services from a customer viewpoint 	<ul style="list-style-type: none"> ■ Ensure customer service / management training is available to staff ■ Provide support to staff to develop a customer-focused culture ■ Maximise the use of existing council assets – the Contact Centre, First Stop, Libraries – to meet customer and community needs ■ Provide information in accessible formats ■ Trial Customer Services extended opening hours ■ Develop and improve more self-service options on our website ■ Increase the contact centre capacity, making use of automation and self-service ■ Increase the number of automated services for customer access to standard services 24/7 ■ Review services to simplify the customer experience and address their needs at the first point of contact (a 'Tell us Once' approach) ■ Simplify processes to make it easier for customers to serve their own needs 	<ul style="list-style-type: none"> ■ Improve customer service performance monitoring ■ Ensure we provide the best possible experience to our customers ■ Improve the way we monitor and measure customer outcomes across all contact channels ■ Develop measurable corporate customer standards based on customer feedback ■ Publish annual corporate customer service standards ■ Incorporate customer feedback into service improvement and contact channels ■ Train staff to better deal with customers' needs

Figure 3: Our Customer Service Strategy on a Page

5. THE CUSTOMER SERVICE STRATEGY AIMS

5.1 AIM 1: IMPROVE OUR UNDERSTANDING OF OUR CUSTOMERS

5.1.1 Who are our customers?

Plymouth City Council deals with a wide range of people across the city. The council is a highly complex organisation which facilitates the well-being of those that live, work or play in Plymouth – be it physical, mental or economic well-being. As such, its customers include:

- Council tax payers
- People with disabilities
- Builders and property developers
- Victims of domestic violence
- Private landlords
- Religious groups
- Unemployed residents
- Schools
- Homeless people
- Road users
- Older people
- Single parents
- Looked after children
- Business owners
- Charities and voluntary organisations
- Asylum seekers
- Various ethnic groups
- Council departments (internal customers)

Whilst the list above is not exhaustive nor is it mutually exclusive it serves to demonstrate the sheer range of customers who access the services that Plymouth City Council offers. In order to ensure the Council is delivering the right services in the right way, it needs to ensure it understands as much as is possible about the varied customer groups. The Council needs to develop its understanding about the people who use its services and those customers who do not use its services, as well as recognising and working with the interdependencies that may exist between customer groups. For example, older people and younger people in relation to housing needs. Finally, the Council will need to think ahead in order to plan for future customer needs and changing expectations.

5.1.2 Better Customer Engagement

A Brilliant Co-operative Council will recognise and respond to the diversity of the community it serves, creating tailored responses to suit wide-ranging needs. Plymouth City Council exists to serve the needs of its communities and these communities increasingly expect to be able to influence service design and delivery. Improving services means engaging with customers at all levels to find out what they want, ensuring effective delivery and being accountable for that delivery.

To achieve this Plymouth City Council plans to involve customers in its decision-making processes and consultations in a more proactive way by using the agreed [framework for working with our citizens and communities](#).

Customer engagement and feedback helps deliver a culture where resources are given to where they are most needed. The Council currently uses tools such as Govmetric and both ad hoc and regular customer surveys. It will commit to develop further tools to advance the richness of this data and improve its use across the Council.

5.1.3 Customer Insight

The process of developing and implementing the Customer Service Strategy needs to be guided by insight, and insight specifically relating to:

- The customer;
- The services the council is providing;
- The current usage of contact channels as well as the propensity for customers to use channels that may be available to be used in future

It is with improvement and development of customer understanding that Plymouth City Council can better design and deliver access to and delivery of services to its customers. For example, developing and using customer personas can provide a deeper understanding of customer experience, customer journeys and customer requirements enabling Plymouth City Council to provide services as a bundled package to customers who need multiple services.

5.1.4 Meeting the expectations of Plymouth's customers

In order to exceed customer expectations as outlined as an outcome in [the Brilliant Co-operative Council's Corporate Plan 2013 – 2016](#), Plymouth City Council must provide services that are:

- Easily accessible
- Simple to use
- Streamlined
- Convenient/accessible
- Efficient
- Cost effective
- Robust/secure

These characteristics for services apply across channels. It should also be noted that customers have expectations of the choice of channels too now. Many customers will expect to be able to transact easily with the Council via the internet and the fastest growing group of customers¹ are those with an expectation to be able to interact via a mobile device.

The proliferation of choice of method and type of connectivity is fundamentally changing the way that Plymouth citizens expect to be able to do business with the Council. At the same time, demographic and workforce changes are requiring Plymouth City Council to do more with less.

5.1.5 Aim 1 - Key Actions:

- Implement a clear and consistent approach to gathering information about our customers
- Continue to subscribe to the MOSAIC public sector profiler provide by Experian

¹ Based on national trends

- Explore the development customer insight and promotion of customer personas to aid decision-making and service delivery across the Council – in the short term specifically which services should be bundled together and which interactions should be provided face to face in different community settings such as libraries.
- Develop and deploy Innovative Technology solutions to support and enhance customer insight activities
- Generate and maintain a single record of the truth about our customers across the Council; a 'Tell us Once' approach
- Review services from a customer viewpoint and redesign services that increase opportunities and provide more choices for customers to contact Plymouth City Council in a way that suits them
- Improve our engagement with and involvement of customers in the design of services
- Develop performance management measures for all parts of the service delivery across all Council services including channel usage, customer satisfaction and service delivery

5.2 AIM 2: IMPROVE THE WAY WE SERVE OUR CUSTOMERS

Today customers contact us using traditional channels such as Face-to-Face, telephone, whilst web contact is very limited. In the current financial climate and budget cuts being imposed by the central government, the council is forced look at alternate ways by which customers can interact via their preferred channels. As part of this aim of the strategy future customer contact access will be outlined.

5.2.1 Customer Access and Channel Management

Channel management – the management of the selection, rationalisation and integration of service delivery channels, including not only the face-to-face, telephone, mail, fax, Internet and e-mail channels as well as virtual contact centres at different locations but also channels, currently very underused by the Council such as text messaging, social networking and mobile applications will be at the fore-front of customer services.

To respond to customer needs quickly and efficiently, the traditional contact channels will need to be improved and new automated contact channels must be developed and deployed so that customers are able to interact with the Council 24/7, which will encourage channel shift to occur as well as channel optimisation.

Plymouth City Council recognise that not all services can be delivered via digital channels, however, there are services that are commonly used by all the citizens in Plymouth, which often have very simple transactions that can easily be delivered effectively and efficiently through automated channels. In order to guide the Council through its channel migration and putting types of transactions onto digital delivery channels an Interaction Delivery Framework has been developed.

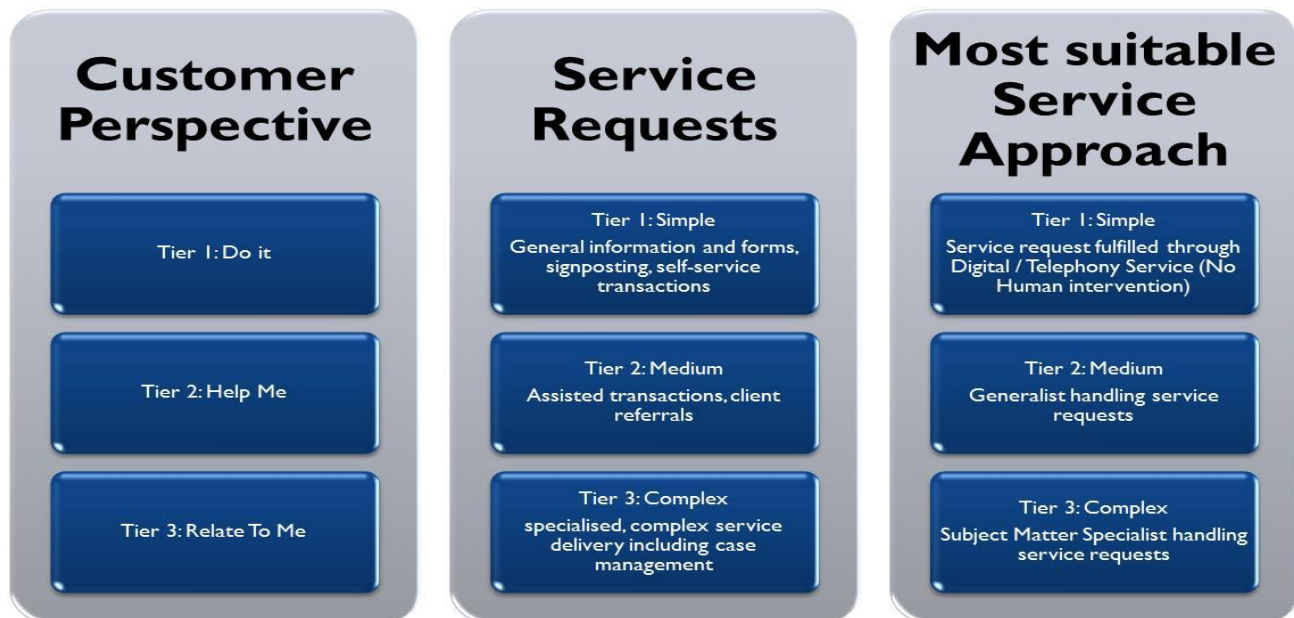


Figure 4: Interaction Delivery Framework

Within the Interaction Delivery Framework the interaction categories are:

Tier 1 interactions or “simple” interactions includes responding to general enquiries, providing forms and other standard repeatable transactions that do not inherently require face-to-face delivery. These interactions frequently don’t require the customer to even identify themselves and also offer

very limited opportunity to exceed expectations – though failing to deliver against a tier 1 request will cause significant customer frustration. For these reasons automated solutions are the suggested best fit for tier 1 interactions. It is intended that, to the extent possible, these “simple” services will be migrated to digital channels, offering self-service functionality in order to meet customers’ expectations for reliable and convenient access to services. However, Tier 1 interactions will also continue to be available through traditional channels so that customers who cannot self-serve are supported. Staff will be trained and encouraged to assist customers in using digital channels so that they can gain the knowledge and confidence to begin to self-serve. The Council will also look at options to design and integrate virtual agent contacts e.g. web chat on a digital channels to further support customer migration cost effectively.

Tier 2 interactions or “medium” interactions involve assessment and/or expert judgement that do not lend them to full self service delivery even for the most technical customer groups. Tier 2 interactions are relatively high volume and do not require a long term relationship with the customer in order to meet the customers need. Customers may want to process their request at a convenient location to them. To meet the customer needs and demand, the Council will explore opportunities to make relevant Tier 2 type interactions accessible in multiple public locations such as libraries etc. By extending the locations, the 1st Stop Shop service delivery can focus more on complex service needs, and the staff at the extended locations will be able to deliver interactions efficiently within a given Service Level Agreement.

Some of the Tier 2 interactions will be supported via digital channels. For these customers virtual contact agents will be available to assist via web-chat during office hours and extended hours. This will enable customers to interact with us more frequently and conveniently and we will be able to get a better understanding of their needs.

Tier 3 interactions or “complex” interactions which require subject matter expert interactions in support of meeting the customer needs and their demand will fall in to this category.

Complex or Tier 3 interactions will be handled by the customer service agents from inception of the request to provide a resolution that meets customer expectation. Even after implementing the services the maintenance of those services will be monitored and governed by the subject matter experts.

The council will work collaboratively with the service partners and customers in maintaining the service delivery aspects to the highest standard. Regular service reviews will be undertaken to measure its performance and identify areas of improvements in service delivery through understanding the complexity of transactions and the availability and ease of use of contact channels.

5.2.2 Introducing digital channels

We will identify those services that will be more cost effective if offered through digital channels and what the likely take up of those channels will be. It can be quite complex process but with the right support and guidance online this can lead to many successes.

Channels have a number of important characteristics which influence the way the services and transactions are delivered to customers. All channels can provide an efficient service but cost per channel and the availability of the services will differ across the channels. Table .., below outlines Plymouth City Council's current channel characteristics in relation to customer service delivery:

Channels							
Characteristic	Back-Office	Call Centre	Front Office	Self Service (Web)	Self Service (phone)	Extended Location	Other Digital Channels (Mobile, Email, etc.)
Service Time	Contractually bound to operate in-line with front office timings	* 08.30 – 17.30	* 08:30– 17:00	24/7	24/7	N/A	Email – 24/7
Ease of Access	Low - Moderate	Low - Moderate	Good	Low	Very Low	N/A	Email - Moderate
Capacity	Low - Moderate	Low	Moderate	Very Low	Very Low	N/A	N/A
Cost per transaction	Medium - High	High	High	Moderate	Moderate	N/A	N/A

**subject to change on 10 November 2014 to include late nights and Saturday opening.*

Table 3: Current Channel Characteristics

1st Stop Shop: The design for the new 1st Stop shop will provide customer service agents and self-service terminals. When customers walk through the shop entrance the meet and greet service staff will liaise with customers and understand their needs and will be able to guide them to use the service on premises that fits their needs (note this may require a handoff between staff which will work in the same way as described below in the contact centre). In this way the customer requirements can be dealt with accurately and efficiently.

Customer Contact Centre: Today when customers call the contact centre the calls are put on queues to be answered. This will be transformed to:

- Customer requests for information will be handled through automated messages. At all times customers will have the option to speak with an agent. Where the information provided via the automated service does not resolve the requirement of the customer they will be connected with an agent.
- When calls are redirected to agents, the agent will try and respond to customer requests efficiently within a given Service Level Agreement. If the customer request is complex then the agent will create a case by gathering customer information and this will be passed onto a subject matter expert. When the call is passed onto another agent, all the details captured by the first agent will be available to the subject matter expert at the time of call transfer. This will prevent customers repeating their requests and will create a seamless customer journey.
- For customers who want to inform us of changes to their circumstances and update their personal information relating to services, a telephony capability will be developed and implemented to handle the request and this service will be available 24/7.

Web Services: The current web service is limited to relaying general information to the customers as well as some silo based services providing transaction support. In some cases the transactions have been designed poorly and are hard to use and in other cases they are not integrated with other systems and require manual rekeying of customer requests. As part of the strategic intent to deliver channel shift, the new web platform will be developed and implemented to handle:

- Request for information: In addition to the information published on the web, if customers require further specific information then a capability will be available to request additional information through a web form request. The requests will be monitored and responded by the back-office team within a set Service Level Agreement.
- Capabilities will be developed and implemented for customers to contact us via a customised portal. The personalised service will provide an enriched information access. This capability will also allow customers to exchange electronic forms and other documents supporting their needs.
- Integrated processing capabilities for application processing and transactional payment will be developed and implemented, cutting out the requirement for manual rekeying of data.

Email Services: The current email capabilities will be transformed and integrated with a system for routing requests and the new case management system.

Mobile: This will extend the development of the existing mobile app and implemented as part of the Customer and Service Transformation Programme to enable customers to have more options in using digital contact channels. This will be aligned to the development of the website e.g. responsive design to Smartphones and tablet devices.

Extended Locations: The council is determined to improve customer service capabilities in order to meet customer needs and wants at their convenience. In meeting this request, some of the Tier 1 and Tier 2 capabilities will be available at these extended centres. The extended centre locations will be identified and published after consultation with the customers, service providers and partners.

Social Media: Today social media is regularly used by many of the Council's customers. It is the Council's aim that use of social media will be increased throughout the council to provide increased opportunities for customers to provide feedback and register simple tier 1 service requests e.g. report a pothole.

Plymouth City Council will identify the interaction types and categorise them. An example is shown in Table 4.

Service Example	Simple	Mediated / Assisted	Complex / Comfort
Pay Council Tax	X		
Parking Permit	X	X	
Adult/Children's Social Care Service Provision			X

Table 4: Service by Interaction Type

Following this the Council will identify the most effective channel for each service/interaction type. An example is shown in Table 5.

Category / Channel	F2F	Tel	IVR	Web	SMS	Social Media	Other
Simple	X	X	X	X	X	X	X
Mediated / Assisted	X	X		X			X
Complex / Comfort	X	X					

Table 5: Interaction Type by Channel

To get the customers of council services to migrate to new channels will require a number of campaigns:

- Meet and Greet staff at the Shop in 71 New George Street who can direct customers to the right advisors, and provide assisted self-service to educate customers to use the online systems in the future
- Marketing campaigns to get customers familiar with the easier and more convenient options of self-service.
- Use of social media to update and inform customers of changes to the way they can access services at different times.
- Use of SMS messaging to update customers on progress of transactions.

Plymouth City Council’s staff will be trained to provide excellent customer service and to recognise the needs and wants of customers and actively find resolutions for customers as quickly as possible. If a customer comes into the shop or call our contact centre, they will expect and get the same customer experience regardless of the channel. If a customer starts a transaction on the web, and then feel they need assistance by phone, the Contact Centre agents will see the same screens as the customers do so they can guide the customer through the process. Wherever possible once a customer has logged in to the website their details will be automatically populated so they don’t have to re-key them again and again.

5.2.3 When can we introduce new channels?

This is a journey and we have already started.

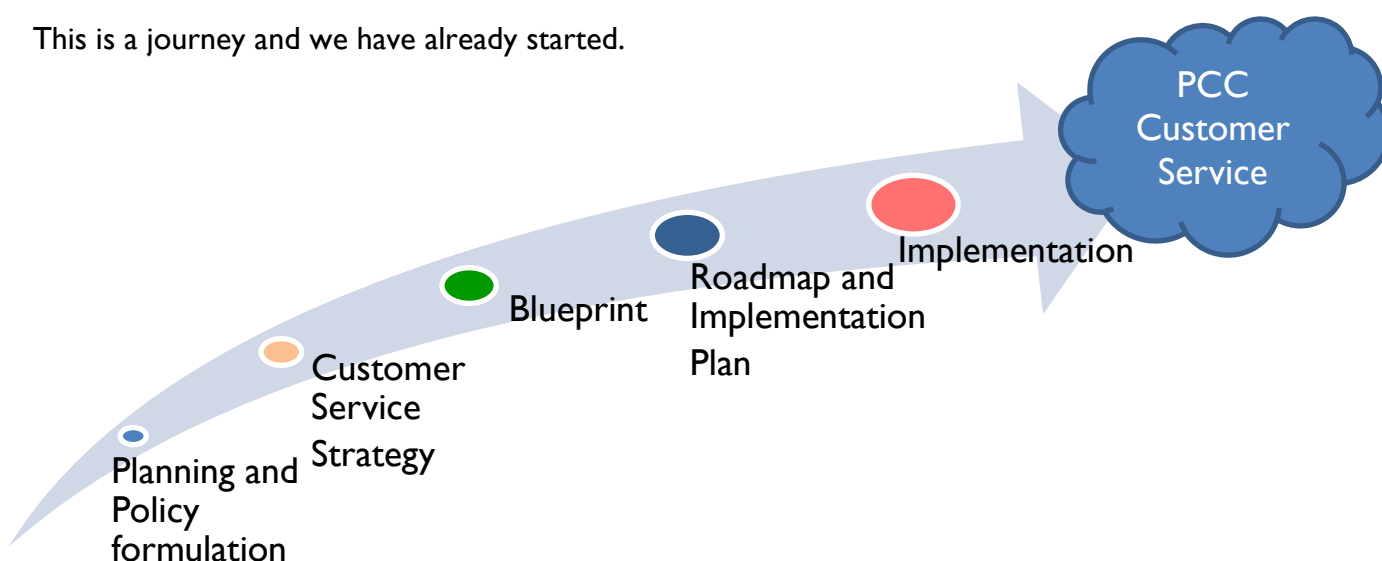


Figure 5: The Journey to the Plymouth City Council Vision for Customer Service

The Blueprint for Customer Service is already underway and this Strategy is needed to inform the direction of that Blueprint. The Roadmap for the implementation has started with the design and assurance of the Shop and with the Strategy and Blueprint we will be on the way to designing the implementation plan. That Implementation plan will contain all the elements of change including:

- People
- Process
- Technology
- Accommodation

We can already envisage the likely channels that will be in use and brought into use over the next three years as the required technology is deployed.

We recognise that for this strategy to be successful will require that the Council has managed to move customer interactions in two ways. The first way is in driving for simplification in the interactions and shifting them down the tiers from complex (tier 3) to assisted (tier 2) and from assisted (tier 2) to simple (tier 1) – tier shift. This work will be undertaken through process re-engineering and has already been proven to work as demonstrated by the simplified processes operated in the shop in areas around Housing Benefits and Council Tax to increase the amount of work done whilst the customer is with the advisor, so that when the customer leaves they know that their request has been actioned and fewer items are required to be processed in the back office.

The second way we will be moving customer interactions across channels – channel shift. The strategy aims to migrate customer interactions to the most cost effective channels to meet the customer needs. For customers who are able and willing to interact over digital channels the Council will make these channels beneficial to these customers through regular updates and proactive communications. This will allow the Council to focus delivery from the traditional channels, face to face and telephone, on the most vulnerable customers and more complex interactions.

The transition over time in the volume of contacts by channel and tier of interaction type is illustrated in appendix C the channel and tier shift model. This shows that over time the volume of face to face and telephone contacts for all tiers of interaction is anticipated to fall, whilst there is a growth in the volume of simple interactions handled on cost effective channels such as the internet, IVR and other electronic channels such as mobile apps.

5.2.4 Improving Customer Case Management

Plymouth City Council will explore case management tools to enable improved integration between customer service requests across all contact channels and back office systems so that customer requests can be recorded more accurately and the Council is better able to monitor and respond to queries effectively.

This case management capability will improve the council's delivery of service and the customer experience. The importance and value of case management is illustrated in the following scenario :

A customer registers a service request which is then recorded on the case management tool, this will lead to a case reference number being generated and provided to the customer. Once the case reference number is generated customers can track the progress of their case via any channel using the case reference identifier. When the case is registered within the case management system it will

be routed to the relevant back-office team via a work flow engine. Based on the context of the case, the relevant back-office team will own the case and liaise with other departments to make sure that relevant resolution is provided to customer requests within a given time scale. All updates will be communicated to the customer and will be available for tracking via integrated channels.

5.2.5 Aim 2 - Key Actions:

- Ensure customer service / management training is available to staff
- Provide increased support to staff to develop a customer focused culture
- Maximise the use of existing council assets to deliver services to customers at locations convenient to them
- Provide information in clear and accessible formats across all channels
- Trial customer services extended opening hours
- Develop new contact channel capabilities e.g. a transactional website and mobile capabilities, and implement them to improve customer access
- Simplify processes and increase the number of automated services and standard services offered 24/7
- Develop and implement service designs based on the agreed service delivery framework
- Develop an integrated case management capability which can deliver the service across multiple channels

5.3 AIM 3: IMPROVE THE WAY WE LISTEN AND RESPOND TO OUR CUSTOMERS

Aims 1 and 2 outline how the Council will understand its customers and the options it will provide for its customers to interact with services. This section of the strategy outlines how the Council will adopt an continuous improvement approach, efficiently and effectively responding to changing customer needs.

5.3.1 Performance Management

Developing better performance management across the whole council, in relation to customer services, is essential to the improvement of the council's ability to deliver services in ways that are effective, meet the needs of the customer and continually improve. Performance management in relation to customer services needs to be developed so that it:

- Focuses on improving genuine customer priorities
- Has sufficient internal and external challenge
- Has a limited number of key indicators to track performance
- Produces self-sustaining continuous improvement
- Celebrates achievement as well as identifying poor performance
- Triggers action in response to missing targets, indicators and standards

We need to measure the Council's commitment to and delivery of the right outcomes for customers.

For example:

Understanding of the customer's need for services – outcomes:

- The accuracy of volume forecasts for existing services.
- The availability and currency of accurate citizen intelligence that tracks:
 - Current need
 - Desired services
 - Complaints
 - Behaviour tracking and trending.

Ability to deliver services – outcomes:

- The ability to introduce new services without disrupting the organisation.
- The ability to meet demand.
- Ability to invest in support activities such as training, knowledge management and documentation without disrupting services.

Simplification of the procedures to deliver and receive those services – outcomes:

- Percentage of services delivered through integrated channels.
- Percentage of shared services.
- Maximum use of 'internal best practice' for common processes, technologies, and practices.
- Outcome based measures of success for users.

Plymouth City Council will do this through the use of a Balanced Scorecard approach where the measures and criteria for success are embedded in the performance objectives of every staff member. Individually and collectively everyone in the Council is responsible for providing excellent customer

service. This excellence does not just come from the frontline staff dealing with the public but the back-office staff, the managers and leaders as well.

5.3.2 Customer Feedback

Listening and responding to its customers is heavily reliant on the council developing and implementing a customer feedback mechanism that enables staff to record, monitor, review and respond to feedback in a simple process. This will enable customers to have a better understanding of the journey of their feedback, the outcome of their feedback and ultimately the most important aspect for all parties what lessons have been learned and changes made for improvements going forward.

To effectively deliver this the council will need to focus on improving the processes and systems required for a consistent customer feedback process and developing a corporate approach to customer feedback training which will be given to all customers in customer service and customer feedback roles as well as all new starters.

5.3.3 Organisational Culture

Customers are at the centre of all services delivered by Plymouth City Council. The council's employees and its partner service employees should be empowered to deliver quality and efficient service to customers. Considering the importance of staff training aspects, the council will be working with its Organisational Development and Human Resource department and the service departments to identify training requirements to improve staff skills to become the excellent providers of customer service. Plymouth City Council will ensure that staff are adequately supported and engaged throughout all customer service improvement projects to ensure that they have the knowledge, skills and training to provide effective and brilliant customer service.

It is believed that in order to improve value for money services and improve service delivery to customers some of the customer services currently provided by Plymouth City Council could ultimately be provided through third parties. As part of any agreements to this end, Plymouth City Council will agree the terms and conditions in which the services will be delivered, and the service delivery targets for each of the third parties will be developed and measured to ensure our service standards are achieved regardless of whether PCC deliver the service or commission others to provide it on their behalf.

When services are delivered by external providers, all information relating to customer services (customer information, their behavioural aspects, services consumed, etc.) will become the intellectual property of Plymouth City Council. This will enable the council to undertake intelligent analytics to ensure that a continuous improvement process is always at the forefront of Plymouth City Council's customer service delivery.

5.3.4 Staff as Ambassadors of the Community

Council interactions with customers will be designed based on customer needs. Many of the council's employees are also citizens of Plymouth, and hence they are also customers. We will engage with our staff to the extent they would want to be involved in the community to work as ambassadors of PCC where they could relay the information to the community and relay back their feedback to the council. This integrated approach will help to:

- Identify the service delivery priorities and shape them based on the needs and customer insight information
- Seek opportunities to deliver services through partnership arrangements
- Seek opportunities to collaboratively work with other local partners in delivering shared services
- Consolidate service delivery into one approach
- Enhance knowledge based through lessons learnt and be able to apply it across the council for better delivery models

5.3.5 Aim 3 - Key Actions:

- Develop in a co-designed approach with customers and partners and implement Customer Service standards across the council and publish performance against these on an annual basis
- Develop a performance management framework to improve customer satisfaction monitoring
- Improve the way we monitor customer outcomes across all contact channels
- Incorporate customer feedback mechanisms into all service improvement projects and across all contact channels
- Understand current and future customer needs to define and develop service designs which meet council's priorities.
- Train staff to be better able to deal with all customer needs
- Review through a process of service reviews back-office and front-office processes to establish which services could be improved for customer service delivery and which could potentially be delivered through external providers.

6. GLOSSARY OF TERMS

Customer Insight	The collection, analysis and use of information which allows an organisation to further understand its customers in order to better meet the needs of those customers.
Customer Feedback	Current practices in all Council departments in relation to all aspects of customer feedback of all types including MP enquiries, councillor casework, corporate complaints, comments and compliments.
Customer Satisfaction	A measure presented as a numerical value which shows the perceived satisfaction of the customer.
Channel Shift	Encouraging customers to use the contact channels most appropriate for them. Often this means ensuring customers use the most cost effective channel and can 'self-serve' and perform transactions/ search for information without the assistance of Plymouth City Council staff
Co-operative Commissioning	Co-operative commissioning is an approach that puts citizens and outcomes at the centre of commissioning and creates stronger relationships between key stakeholders. It looks beyond cost and „value for money“ to put greater emphasis on the social costs and benefits of different ways to run services.
Community Engagement	A form of contact where an organisation engages with its different customers to find out their needs. Methods of customer engagement include surveys, focus groups, user-testing events etc.
Contact Channels	The mechanism or device which customers will use to access Council services, examples include Phone, email etc, online, social media, mobile phone, face to face, post/ letter.
Customer	This refers to any user of Plymouth City Council services, whether voluntary or involuntary. This includes residents and visitors to Plymouth, service users and their representative and some commercial organisations.
Customer Journey	The process the customer goes through in order to obtain information, advice or to complete a transaction – this can range from finding out what time a recycling centre opens, to completing an application for a blue badge. Defining a customer journey involves identifying all the stages a customer goes through during the interaction with the Council
Customer Segmentation	A sub-set of customers made up of people sharing one or more characteristics that cause them to demand similar services.
Digital Self Service	The use of digital channels e.g. online, web portal, mobile devices, kiosks etc. to enable customers and staff to complete all processes involved in accessing services on their own.
Ist Stop	The New George Street Shop.
First Point of Contact	The first correspondence initiated by the customer regarding a new query or request.
Mosaic	A database owned by Experian that covers the whole of the United Kingdom. It classifies customers into 61 types, split into 11 groups. Takes into account life-styles, culture and behaviour amongst other things.
Performance Management	Activities that ensure goals and objectives are met in an effective and efficient manner. Performance appraisal for staff is one method of performance management.

7. APPENDICES

Appendix A: Customer and Service Blueprint and Roadmap

Appendix B: Implementation Plan

Appendix C: Tier and Channel shift model