

WIRRAL COUNCIL

CABINET

13 OCTOBER 2011

SUBJECT:	CUSTOMER ACCESS STRATEGY
WARD/S AFFECTED:	ALL
REPORT OF:	DIRECTOR OF FINANCE
PORTFOLIO HOLDER:	COUNCILLOR JEAN STAPLETON
KEY DECISION?	YES

1.0 EXECUTIVE SUMMARY

1.1 The Customer Access Strategy (CAS) has been reviewed and updated. It retains the same focus of reducing service costs whilst improving customer experience. However it now also includes reference to the programme of work to co-locate Libraries and One Stop Shops. Across the Council there is a clear need to find savings and the CAS is central to meeting this need.

2.0 RECOMMENDATIONS

2.1 That the CAS, which includes a re-stated introduction and governance procedure, and updated future priorities be approved.

2.2. That an action plan to support channel migration be reported to a future meeting of the Cabinet.

3.0 REASON FOR RECOMMENDATIONS

3.1 To update the CAS to be used as the approved Council policy to develop access to services.

4.0 BACKGROUND AND KEY ISSUES

4.1 The CAS has evolved to meet a changing customer expectation of access to, and delivery of, services. It provides the direction and focus for all services to work together in achieving cost-effective and excellent services for the customer through specific actions and projects.

4.2 Customers of all services whether in the public or private sector are no longer satisfied as passive recipients of service. Their expectation is to have more control over the choice and quality of service delivery, reflecting the experience offered by market leaders. Promoting more efficient services, delivered via the customer's channel of choice by effectively supported staff, with a 'right first time' approach can be low cost for the Council and offer value to the customer.

- 4.3. Customer contact is more than just an interaction; it is about the service received, standard of care displayed and quality of outcomes experienced which is crucial to the customer's perception of the Council as a whole. Services delivered through the corporate access channels offer a more consistent, convenient and monitored standard of service than those delivered through disparate contact channels.
- 4.4. In addition to efficient and effective service delivery the CAS is focused upon delivering high quality services shaped around customer needs, rather than those of the organisation. An example of this is the 'Tell Us Once' bereavement service which recognises that the customer should not have to contact multiple Council services and partner agencies to provide the same information. The Call Centre has extended the service offered when booking Registrars appointments for customers wishing to notify a death. Advisers now promote the 'Tell Us Once' service and book an appointment for the customer, at their local One Stop Shop. A single contact should suffice with supporting processes to ensure this is then shared with all relevant service providers.
- 4.5. The greatest challenge lies with the Council committed to providing quality customer services against the backdrop of making significant reductions to the cost of services. It is imperative that all areas of the organisation work together in achieving cost-effective and excellent services for the customer. To this end, the CAS will play a vital role in highlighting where efficiencies can be achieved by transferring the responsibility for handling customer contact to the lowest cost access channels.
- 4.6. Extending the generic skill base within the Call Centre will allow for additional services to be introduced without the requirement to increase the staffing structure. This will also provide the potential for Call Centre staff to offer support to the network of One Stop Shops.
- 4.7. An increasing emphasis will be on moving service provision, where appropriate, from more costly, mediated channels such One Stop Shops or the Call Centre to self-service through the web. This will be informed by customer insight with the wider commitment to offering channel of choice.

LIBRARIES AND ONE STOP SHOPS

- 4.8. There are potential savings to be achieved, in terms of buildings and staff by aligning complementary services. The benefits to the public will be tangible, giving them the ability to access more services in one location. Libraries work with a range of partners, as do the One Stop Shops, including Police, Health and the Department for Work and Pensions (DWP). By locating services together it improves accessibility and offers opportunities for staff development.
- 4.9. Building rationalisation offers an opportunity for savings. An integrated flexible space looks modern and maximises usage. Schemes and estimates are being prepared for both Bebington and Rock Ferry. The following gives a building update:

- a. At Bebington the One Stop Shop could vacate Pennant House and co locate into the Civic Centre. The space could be modernised and opened out to offer merged facilities.
 - b. At Rock Ferry the Library and One Stop Shop currently occupy one building with two entrances. The plan will develop a merged unit with a central reception with flexible space consisting of pods and booths to complement the Library service function.
 - c. All merged sites could have an integrated reception served by merged Library and One Stop Shop staff operating to a single job description. Specialist advisers could also deliver some Library duties supported by a streamlined management structure.
 - d. Bromborough One Stop Shop is currently located in a DWP site which is not as easily accessed as it could be. Rationalisation will look at the options available at Bromborough Library and the benefits of a linked service from this point.
 - e. Eastham Library and One Stop Shop currently occupy one building in separate areas. An integrated service will be achieved with relative ease.
 - f. Hoylake One Stop Shop is located in a DWP site and I will look at the options available at Hoylake Library for a linked service from this point.
 - g. Moreton One Stop Shop and Library are on different sites and I am reviewing ways to achieve a linked service on one site.
 - h. Upton One Stop Shop is located in Upton DWP and I will look at the options available at Upton Library for a linked service from this point.
 - i. West Kirby Library and One Stop Shop occupy the same side of the building alongside the Leisure Centre and Health Centre and there are separate entrances. I will review how the Library and One Stop Shop can be better joined together with a single reception.
- 4.10. To achieve co-location and integration a number of complex staffing and service issues are being addressed. On staff matters this ranges from the impact of the EVR exercise to the ongoing requirements that a merged service will bring such as:
- opening hours,
 - flexible working,
 - shift patterns,
 - performance management,
 - changes in job roles

All of which are being aligned and are being presented to staff representatives. The aim is to ensure service user expectations are met and the revised service has the ability to expand usage in all aspects.

- 4.11. The Customer Services Development Team (CSDT) is working closely with the Library service to look at the following:
- Web development - the Library website is now part of the corporate website, developed to ensure no loss of access
 - Reference Library - staff are being supported to allow this specialist area to be widened and increase accessibility whilst also considering which areas can be cross supported with the Archive Service
 - Bibliographical service - the staff here are working with Customer Services Development Team to review and streamline processes.
- 4.12. We are currently extending the network of customer information screens. All One Stop Shops are already equipped to deliver electronic customer information quickly and efficiently via a network of information screens. The system is co-ordinated through the corporate marketing team and delivers a range of national and local content specifically selected to be of value to customers. The extension programme will see all Wirral Libraries equipped with the system, greatly increasing the ability to communicate with the public and improving customer outcomes as a result.
- 4.13. Radio Frequency Identification (RFID) is being implemented for the book stock at New Ferry. The project using self service technology and dual role staffing from the Library Service and Children and Young People's Department is ready to open. Equipment has been ordered to install in Heswall with an anticipated delivery date of the end of September to co-incide with the move to being a co-ordinated site.
- 4.14. We have procured an e-books package and are working with the supplier to build the collection prior to the anticipated launch date in October which should co-incide with the annual Wirral Bookfest.

WIRRAL WEB

- 4.15. The current Council website was launched in May 2010 to a very positive response. Since that date there has been an 18.5% increase in visitors to the site from the previous year, which has exceeded the target increase of 10%. The visitor figures after one year indicate over 158,000 visitors per month generating up to 755,000 hits.
- 4.16. The site is being continuously developed, most of which is in response to daily feedback from our customers who have embraced the "rate this page" facility with enthusiasm.
- 4.17. In the 2011 SOCITM Better Connected report, Wirral maintained a two star website in a review that is acknowledged as being more demanding year on year. Many positive things were mentioned in this report plus a number of recommendations around the transactional elements of the site. A number of these have already been put in place and the next to be addressed is the redesign of the homepage to increase the "push" of customers to online services which will be live by the end of summer 2011.

- 4.18. In line with the ambition to consult more with customers and have more transparent processes, an E-petitions system has been launched. This service is in the early stages but a number of petitions have already been submitted and in some cases attracted a strong following.
- 4.19. Teen Wirral (www.teenwirral.com), the website for Wirral's 13 to 19 year olds was launched at the end of summer 2010 and contains information about activities and advice for young people. Evidence shows that how young people spend their leisure-time really matters, and taking part in constructive leisure-time activities through teenage years has a number of benefits. It can help to improve attitudes to school; build social, emotional and communication skills; help young people avoid taking risks such as experimenting with drugs or becoming involved in gangs; and improve their confidence and self-esteem. Local authorities have a statutory duty to publicise positive activities, and a website is the most relevant way of communicating with young people.
- 4.20. A new Intranet homepage has been developed in the highly regarded and increasingly used open source free software. This helps to improve communication to staff and has also put a template in place for further information areas such as information security, training and development. This homepage and use of open source software will pave the way for integrations into Electronic Document Management Systems and a new integrated intranet.
- 4.21. The library website which was previously stand alone has been brought into wirral.gov.uk. It will now benefit from corporate support eg resilience, new developments and corporate software such as on line forms. It will be kept up to date and events will be promoted on Wirral.gov.uk. Users can search catalogues, renew books, reserve books and access online reference materials.
- 4.22. A number of future developments are being assessed for suitability such as the use of Mobile Apps to give greater and more efficient access to services. Video could provide an alternative way for advice and information to be distributed in a clearer and more accessible manner. There will be greater analysis of how successful a customer's journey has been through the web site and an emphasis on guiding the customer to the correct online service as efficiently as possible. The Intranet and possibly an Extranet will be developed in future strategies and Geographical Information Systems (GIS) will have a greater part to play in identifying what services and amenities are available to customers within their local area. New social-media channels (e.g. Facebook; Twitter) will be considered as part of this strategy but the intention is to avoid the cost of early adoption and developments will be monitored in consultation with the Interim Head of Planning, Engagement and Communication monitoring of these developments to ascertain when their usage will be cost-effective and appropriate to the Council.

- 4.23. As part of the ongoing commitment to producing a 24/7 self serve portal, officers have developed over 20 forms that integrate seamlessly into the Customer Relationship Management (CRM) System. These forms have been tested and have seen positive take up by customers. The requests for service can be tracked by the customer to avoid unnecessary progress chasing contacts making services more visible and reducing costs for the Council. A development programme is in place which is used to select the next batch of forms for development, based upon complexity and potential volume of usage.
- 4.24. A complementary “online forms” product has been procured using Government grant which is hosted by the Customer Services Development Team (CSDT). This product allows rapid production of simpler, non-transactional forms in conjunction with the business owner to ensure consistent and relevant information is captured via the web. It also allows CSDT to “pilot” forms to confirm if they are appropriate for self-service before they are handed over to IT Services for development into full CRM integrated forms.
- 4.25. As more forms come online, feedback builds up to enable the forms to be fine tuned to ensure the customer finds them easy and straight forward to complete. The intended outcome is accessible, streamlined services which are delivered in a way appropriate to customer needs.

CUSTOMER ACCESS STRATEGY PROGRAMME OF WORK WITH DEPARTMENTS

- 4.26. The role of the Customer Services Development Team (CSDT) is to work with departments to analyse core customer access business processes, which would include, identifying customer demand, establishing efficiencies and re-engineering service for delivery through the core access channels. Another area of work is identifying future trends in terms of customer service and to produce business cases for their delivery. An update of the work is listed below:
- a. Service Delivery System
 - i. The investment in a Customer Relationship Management (CRM) system provided the Council with a corporate application capable of delivering consistent, quality and cost-efficient services across all access channels. Anticipating future demand, the CRM has become part of a wider Service Delivery System (SDS) which incorporates the recently redesigned internet and on-line transactional forms, processing of generic email contacts, mobile working, support for contractor-delivered services, management information reporting, mail merge facility to support on-demand document production, management of corporate customer feedback, a developing intranet service delivery ‘portal’ and text-messaging functionality. The CRM will adopt a ‘citizen-centric’ approach which will enable a complete view of a customer’s interactions with the Council over the range of disparate services offered.

- ii. Consideration is being given to migrating to a later release of the Oracle CRM to maximise available functionality and minimise support costs, as agreed at Cabinet on 23 June 2011 (min 34). The intention is to make the CRM supported processes for mediated service (i.e. Call Centre and One Stop Shops) and self-service (i.e. web) as similar as possible for consistent delivery and increased use of self-service. Options for service efficiencies using the proven CRM template for mobile working are to be explored.

b. Technical Services

- i. Work continues to move all Streetscene services to a consistent delivery using the CRM. Statistical reports have been developed to enable Managers to monitor the performance within their areas against their targets.
- ii. The Highways Maintenance functionality and reports were amended in CRM to reflect Colas requirements and to allow effective monitoring of the contract.
- iii. In September 2010 all telephone calls relating to leisure services were transferred to the Call Centre which now handles leisure bookings and general enquiries relating to leisure services.
- iv. The CRM was developed to support the transfer of parks and open spaces to Technical Services so that customer contact data could be captured to inform the development of the service. It was also developed to support the Dog Fouling taskforce initiative. A web form was developed for customers to report Dog Fouling issues which integrates directly into the CRM.

c. Corporate Services

- i. The Housing Options service was reviewed, re-engineered and scripted for delivery by customer service advisors. The service is now delivered in all One Stop Shops and only emergency cases are referred directly to specialists in the service area. SMS text messages are used to remind customers of their appointments.
- ii. Support was given for the Home Insulation scheme, allowing customers to request this service via any access channel, including self-service through the web, in conjunction with the external agent contracted to carry out the works.

- d. Finance
 - i. Both the Business Rates Section and Sundry Debtors Section staffing levels have been reduced as part of the EVR / Severance scheme, and the service has been re-designed for delivery by customer service advisors in the Call Centre.
 - ii. Business analysis has been carried out, options put forward and recommendations provided in Housing Benefit Overpayments, Licensing and Freedom of Information requests.
- e. Children and Young People
 - i. Work has taken place with the Strategic Change Team on the Fostering campaign with the Customer Services Development Team developing an on-line form to allow expressions of interest to be registered on-line, as well as via the corporate access channels - the Call Centre and One Stop Shops. This also provides statistical data for the service.
- f. Pest Control
 - i. Assistance has been given to the Pest Control service, already supported by the CRM, to respond to the impact of EVR and improve processes.
- g. Blue Badges
 - i. Following a change in legislation, a review of the Blue Badge process is underway with the support of an online form.

ACCESS CHANNEL SUPPORT & MIGRATION

- 4.27. Channel migration is the process of re-engineering services in such a way as to encourage more customers to access services via the most effective and efficient channel available. Central to channel migration is the recognition that customers will use the most convenient channel for them and as such public consultation is crucial – channel migration is not simply about persuading as many people as possible to use online channels. Successful channel migration is achieved by demonstrating that the cheapest access channels are also the most convenient and accessible. A separate Action Plan is being developed to support channel migration which will be presented to the Cabinet.
- 4.28 The CAS makes the commitment that customers will be offered their channel of choice, with certain more complex services or the most vulnerable customers identified as being more pertinent to delivery at One Stop Shops with the physical presence of the person being an advantage to query resolution as opposed to the telephone or web. It does not propose a 'one size fits all' approach and looks to encourage people to use the cheapest channel that is the best fit for their service query. Consideration has been given to 'digital inclusion' to ensure customers without home access to electronic communication are provided with accessible alternatives.

- 4.29. The range and quality of service offered through all access channels continues to develop in line with the overall strategy of encouraging customers to use the most cost-effective route of contact where their service request can be satisfied. The SOCITM report Better Served: Customer Access, Efficiency and Channel Shift (2011) echoes the CAS, identifying the potential cost reduction from 'active customer management' arising from three main sources: first time contact resolution; reduced avoidable contacts and channel shift.
- 4.30 Assessments of costs of individual contacts by channel vary considerably but the consistent finding is the vastly reduced cost of web contacts in comparison to telephone or 'face to face' contacts. The table below details the channel costs estimated by the SOCITM Survey 2011, referred to above and offers comparison with volumes recorded over the Council access channels. This would suggest a 'cost' saving of £7.08 for every contact shifted from the OSS to the web and although such estimates are only indicative of actual costs and unconcerned with the issues of each service suitability to channel type, the tangible benefits for this strategy are clear.

	Cost per Transaction*	2007/08	2008/09	2009/10	2010/11
One Stop Shops	£7.40	263737	268154	256444	250765
Call Centre	£2.90	991365	864867	813780	796372
Web	£0.32	N/A	730045	754634	1413240

SOCITM 2011

CUSTOMER FEEDBACK AND CUSTOMER INSIGHT

- 4.31. CSDT handles corporate customer feedback.
- Co-ordinated and consistent process for recognising, recording, resolving and monitoring all customer feedback through the CRM system (corporate complaints, Councillor/MP enquiries, Ombudsman contacts, suggestions, compliments).
 - Creation and on-going support for a network of customer feedback coordinators to ensure reliable collation and standard of service provided across the organisation.
 - Provision of management information for monthly, quarterly and annual performance reporting to continually improve service standards, with the Council currently taking an average of 10 working days (against a target of 15 working days) to resolve complaints in 2010/11.
 - Excellent source of customer insight and promotion of a feedback system as a process of 'putting things right and learning from the experience' – as an example 345 feedback contacts resulting in changes to process or procedure were identified in 2010/11.
 - Improving liaison with the Local Government Ombudsman (LGO), with the Council responding on average within the LGO service targets for 2009/10.
 - Improving timeliness for responses to Councillor/MP enquiries, currently resolved on average within six working days against a target of ten working days. At the request of Members, the provision of an automated weekly email report detailing contacts raised through corporate access channels and providing status updates.

- Managing customer expectation and clarifying the standard of service delivery expected from staff through promotion of the publicised Customer Care Standards.
- 4.32. Work is progressing to align customer feedback reporting with the corporate plan themes, focusing on the qualitative aspect of performance in dealing with customer contacts. The opportunity for wider organisational learning from individual responses to feedback received is a focus for the complaints process.
- 4.33. Such insight into customer needs and motivations can enable the organisation to reduce costs, waste and complaints with the ability to make more informed decisions based on this intelligence. The CAS gives direction to ensure the Council is responsive to customer views and learns from feedback to shape future service delivery through this evidence-based approach.

JOINT WORKING WITH OTHER ORGANISATIONS & AGENCIES

- 4.34. One Stop Shops continue to work with a considerable number of agencies and organisations. The up to date range of surgeries is available on the website. With One Stop Shops working more closely with the Library service this allows the Authority to enhance and align partnership work across the Borough.
- 4.35. Her Majesty's Revenues & Customs (HMRC) is now located within the Birkenhead One Stop Shop where they offer a face to face service. This is maximising the use of the premises, retaining a presence in the Borough and improving access for HMRC customers.
- 4.36. Promotion of services is crucial and undertaken in a variety of ways. Customer Services attend community groups, provide presentations, and have display stands.

EQUALITY AND DIVERSITY

- 4.37. A commitment to equality and diversity is integral to delivering excellent services, responsive to reaching all customers including those who are current non-service users. The recognition that different customers have different physical and service needs informs the access plans, promoting access across the range of contact channels.
- 4.38. Greater customer insight will continually inform the CAS with the aim of ensuring service delivery is centred on the needs of customers and that all communities have access to these services via the preferred channel.
- 4.39. An Equality Impact Assessment is being undertaken to ensure the stated objectives of the CAS provides equality of opportunity and promotes diversity in employment and service delivery.

4.40 Maintaining the delivery of the CAS will make service areas more effective, efficient and accessible. Timely responses and joined up services provide value for money for both the customer and the Council. Customer satisfaction is maintained as individuals are dealt with by experienced staff, fully trained in all aspects of customer care. Customer insight provides a better knowledge of customers to help shape services in the future. We will continue to promote channel of choice with a targeted promotion of the most cost effective channels appropriate to the service.

4.41. The Library and One Stop Shop co-location provides a key opportunity to first sustain and then to re-invigorate and extend service usage in both areas. This will put in place a modern service that both aligns with all access channels and be the local face of the Authority.

5.0 RELEVANT RISKS

5.1 If the CAS is not reviewed and refreshed the service offered directly to customers, clients and service users could become less effective and increase expenditure by not utilising corporate access points which when maximised in use offer co-ordinated access and access to relevant information.

6.0 OTHER OPTIONS CONSIDERED

6.1 Allowing services to offer disparate access channels to each individual service is not recommended because of the variable level of quality of contact, the lack of consistent service standards or management information to drive performance, and the likely overall expenditure level in operating separate service led functions.

7.0 CONSULTATION

7.1 Customer Services have been involved in the public consultation work. Current consultation exercises which involve support from customer services include Neighbourhood Plans and Budget 2012-13.

7.2. On a regular basis One Stop Shops meet key service users including partner organisations as well as voluntary and community organisations and other public service bodies

8.0 IMPLICATIONS FOR VOLUNTARY, COMMUNITY & FAITH GROUPS

8.1. One Stop Shops engage with local voluntary, community and faith organisations. This strategy takes account of the need to respond to the needs and requirements of these organisations.

9.0 RESOURCE IMPLICATIONS:

- 9.1 **Financial** - Migration of services through the corporate access channels supported by back office change will result in cost savings either in buildings, staffing or a reduction in the duplication of work. The merger of Libraries and One Stop Shops will further assist in this. The capital costs of any work are reported on a scheme by scheme basis.
- 9.2 **Staffing** - Migration of services to the corporate customer service access channels of the Call Centre and One Stop Shops should lead to a reduction in back office staffing levels which can either be savings or refocused to other areas. Increased usage of the web should lead to a similar reduction of staffing levels. The Library and One Stop Shop co-location project will also support this.
- 9.3 **IT** - The use of the Oracle Customer Relationship Management System (CRM) is a vital component in the effective handling of contacts via the major channels in respect of a large number of service areas such as Streetscene. Use of CRM will expand with the planned major upgrade to the system. The Call Centre uses specialist IT in recording and storing calls as well as using the workforce management system that predicts contact volumes and resource (staff) requirements which is vital when trying to ensure staffing deployment is correct to respond to demand. The website is now built largely on "freeware" which has proved successful and has seen considerable national interest from other local authorities keen to exploit this developing area of relatively cheap and reliant IT software.
- 9.4 **Assets** – The co-location of One Stop Shops and Libraries will assist Asset Management to maximise the effective use of facilities whilst not affecting service standards.

10.0 LEGAL IMPLICATIONS

- 10.1 There are none arising directly from this report

11.0 EQUALITIES IMPLICATIONS

- 11.1 The Customer Access Strategy seeks to offer the access channel of choice to ensure fair access to all residents. Migration of services to the web is being developed, alongside the increase in access to the internet by Wirral residents. Customer insight information will enable the identification of customers who are vulnerable or who are hard to reach and working collaboratively will help to meet and support these groups in the most cost effective manner.
- 11.2 Equality Impact Assessment (EIA)
(a) Is an EIA required? Yes
(b) If 'yes', has one been completed? Yes (Reviewed July 2011)

12.0 CARBON REDUCTION IMPLICATIONS

12.1 There are none arising directly from this report

13.0 PLANNING AND COMMUNITY SAFETY IMPLICATIONS

13.1 There are none arising directly from this report.

FNCE/174/11

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APPENDICES

Appendix 1 – Customer Access Strategy

Appendix 2 – Current service status for access via website

REFERENCE MATERIAL

SOCITM Better Connected 2011

SOCITM Better Served: Customer Access, Efficiency and Channel Shift 2011

SUBJECT HISTORY (last 3 years)

Council Meeting	Date
Customer Access Strategy - Cabinet	23 July 2008
Access to Services - Cabinet	5 February 2009
Customer Access Strategy - Cabinet	24 September 2009

WIRRAL COUNCIL

CUSTOMER ACCESS STRATEGY

INTRODUCTION

The Customer Access Strategy objectives are to improve the quality of life of Wirral people, working with our partners to deliver the best services we can, in the most efficient and effective way. It is a key corporate policy, which aims to provide the direction and focus for all areas of the organisation to work together in achieving cost-effective and excellent service for every customer. It directly supports the corporate plan's aim of engaging and empowering individuals and communities in the design and delivery of council services. There is a declared strategic action for all departments to take responsibility for rationalising services which will be helped by migrating customer contact to our corporate access channels. The Customer Access Strategy is the overarching drive for us to achieve this.

People want access to a greater range of quality services and expect to be consulted on future service delivery. Our corporate access channels such as one stop shops, libraries, the call centre, generic email addresses and the website are recognised as offering the most consistent, convenient and regularly monitored standard of service. This promotes the creation of efficient services, delivered through the most appropriate and cost-effective channel by motivated staff which can be low cost for the council and offer value to the customer.

Our strategic actions continue to offer a choice of channel, whilst promoting the 'lower cost' channels such as phone or web wherever relevant. Service areas across the council need to make use of these corporate access channels to gain proven service efficiencies and ensure ease of customer access.

Customer insight is best gained through the use of corporate access channels, enabling the council to stay responsive and proactively offer customers a choice of how to access services based on local needs. Each channel, including self-access options, need to be high quality, easy to use and joined up with other relevant services so that queries can be resolved quickly, avoiding unnecessary contacts. This 'right first time' approach aims to minimise the cost of service delivery whilst improving the customer experience.

This strategy addresses the following issues:

Section	Title	What it does
2	Why do we need a Customer Access Strategy	<ul style="list-style-type: none">• Explains why the strategy is central to the corporate priorities.
3	Fundamental Principles	<ul style="list-style-type: none">• Lays down the principles which underpins the strategy
4	Strategic Actions	<ul style="list-style-type: none">• Shows how the strategy delivers the vision on service transformation.
5	Governance	<ul style="list-style-type: none">• Describes how we manage progress of the strategy
6	Reducing Costs	<ul style="list-style-type: none">• Outlines the need to migrate to the cheapest access channel and reduce avoidable contact.
7	Work plan	<ul style="list-style-type: none">• Highlights current and future work.

The Customer Access Strategy plays a key role in achieving the Council's corporate objectives, details of which are provided within this document.

2. WHY WE NEED A CUSTOMER ACCESS STRATEGY

2.1. The investment in the customer access channels is aligned to corporate aims, priorities and strategies. The strategy provides the framework for further developing the Councils interaction with the customer. It is a living document which is reviewed and modified in accordance with local and central government priorities.

2.2. Central Government drivers set expectations of us in terms of:

- Being available when customers contact us.
- Providing joined up services.
- First time resolution.
- Embracing new technology.
- Delivering all in a more economical scale.
- Using customer insight to inform service delivery.
- Shaping services around customer needs rather than those of the council.
- Offering contact channel of choice with an emphasis on improving self-service options.

2.3. In order to assess the effectiveness of this strategy we measure our progress against a set of metrics, these being:

- The cost of providing each service.
- Levels of customer satisfaction with each service.
- Volumes per access channel.
- Customer insight led decisions on promoting particular channels.
- Numbers of repeat contacts (Avoidable Contact).
- Numbers of fully resolved queries at first point of contact.
- Performance against visible service-level agreements.

2.4. We are developing and will use a consistent set of measurements to help accurately measure progress. We will have local performance indicators in every service for each of these measures, as well as for each customer access channel and these will be regularly monitored by the Customer Services Management Board and reported to Chief Officers and Members.

2.5. Wirral Council is committed to ensuring that all of its customers can access its services with ease, and has published a customer pledge, which underlines this commitment.

The pledge states:

We want to:

- Make it as easy as possible for customers to contact us.
- Deal with customer enquiries as quickly as possible.

Wherever and however customers get in touch with us we aim to:

- Resolve enquiries first time – although some issues need to be referred to specialist staff.
- Provide a consistent and high quality service.

We shall make our services available at times and places and in ways which are convenient to the customer:

- We expect that customers may want to contact us by a variety of means.
- We will use evidence gathered by customer insight tools to inform our service.
- We will make it easy for customers to talk to us directly by providing One Stop Shop access in places people can easily travel to.
- We will make it easy for customers to telephone us.
- We will make it easy for customers to deal with us electronically by providing our services via the internet with transactional self access wherever possible.
- Encourage customers to use the cheapest most efficient access channel appropriate to their query.
- We will work with partner organisations to provide 'joined-up' services wherever possible.

2.6. Our Customer Care Standards identify the specific standards to which our staff will be expected to deliver services. In addition a Customer Charter outlines the standards our public can expect when contacting the council. We will monitor our commitment to these standards both internally and externally to measure our success and report openly on it.

2.7. There are key messages that support and help drive the Customer Access Strategy forward to ensure it becomes a reality and remains a focus of service development. These are set out at the end of this strategy.

3. FUNDAMENTAL PRINCIPLES

3.1. Customer Service is pertinent to everyone in the organisation. The following principles outline the reasons why the Customer Access Strategy is crucial.

3.1.1. **Setting the Customer Access Strategy is a key part of the overall change agenda.**

Therefore:

- Ensuring the Customer Access Strategy and its actions form part of each department's ongoing efficiency plan.
- Due regard is paid to other corporate strategies including ICT, People, Accommodation, Equalities, Communications when working on this strategy.
- The HR Strategy will provide guidance for those staff whose role is changed or lost as a result of the migration of services to the front of house.
- Strategy implementation is a "no choice" option as its maximum benefits are achieved when all services are handled as much as possible through corporate co-ordinated access channels.
- Service areas that are receptive to change, willing to commit resources and supportive of these key objectives will experience tangible reduced costs of service and improved quality for the customer.

3.1.2. Ongoing change will focus on both front and back office change to maximise efficiencies.

Therefore:

- The Customer Services Development Team will work with Project Sponsors within departments to review end to end processes.
- Migrating appropriate elements of service to the corporate access channels with a focus on self-service and lower cost channels but a commitment to offering channel of choice for the customer.

3.1.3. Setting out the clear need for resolution at first point of contact wherever possible to minimise repeat or avoidable contact.

Therefore:

- Using the measurement of avoidable contact (defined as contacts that add no value to the outcome or are duplications or caused by failures in business processes) to both identify priorities for improved service provision and confirm the benefits of re-engineering projects

3.1.4. Re-stating the ongoing drive to ensure customer access channels handle service contacts

Therefore:

- All departments where there is customer contact should be delivered through the corporate access channels.
- Relevant service areas need to engage with customer services, in embracing this strategy, with a commitment to providing resources for re-engineering projects and shared aims of reducing cost of service and improving the customer experience.

3.1.5. Ensuring that all services that engage in change have improved efficiency and value for money as an outcome

Therefore:

- Clear project planning principles including business cases are adhered to for all services migrated.
- Services take ownership of re-engineering projects, supported by staff from both customer services and IT.
- Cost analysis is undertaken of existing and revised service delivery to highlight efficiencies realised.

3.1.6. Clearer focus on developing and utilising the web as a low cost self access and transactional contact channel.

Therefore

- Enabling customers to change and update information automatically.
- Encouraging customers and service users to utilise the cheapest appropriate access channel for their enquiry.
- Providing 24/7 access to the widest range of council services possible for customers
- Providing the primary information and transactional channel for customers with a single secure point of access.
- Allowing customers to monitor progress of requests for service received via this channel.

- Supporting the publication of corporate access channel contact information wherever possible.
- Using integrated transactional on-line forms wherever possible complemented by simpler e-forms where appropriate.

3.1.7. **Providing customer choice and encourage customers and service users to utilise the cheapest appropriate access channel.**

Therefore:

- Recognising the ongoing need to provide customers with their preferred chosen access channel in relation to their specific enquiry.
- The Customer Access Strategy does not support a 'one size fits all' approach given the differences in the breadth of services covered.
- Recognising the need to provide quality service standards via the web and call centre to encourage appropriate use of the cheapest available access channels.
- Recognising the need for face to face access providing a response to more complex enquiries and acting as a community hub for Wirral residents.
- Rationalising other face to face access points such as reception points.

3.1.8. **Equality and Diversity**

Therefore:

- Guided by the council's equality policy, we will ensure that services are equitable and meet the needs of our diverse population.
- Access points will meet DDA requirements.
- An Equality Impact Assessment has been completed and appropriate risks / resulting actions highlighted.

4. **STRATEGIC ACTIONS**

4.1. The areas of strategic actions needed to deliver the Customer Access Strategy are:

- **Learning from citizens and businesses**
Engaging with stakeholders to ensure that the service we deliver meets their requirements. We will continue to liaise with the voluntary, faith and community sector so that their views are represented in the way that we deliver our services. We will also use customer feedback gathered as an opportunity for wider organisational learning and inform how our services are delivered.
- **Grouping services in a way that is meaningful to the customer**
Offering integrated packages of services which respond directly to the issues that customers face in their day to day lives, with a timely response to their immediate needs.
- **Rationalising services for efficiency and service improvement**
All departments are responsible for rationalising their services in line with the Customer Access Strategy and engaging with CSDT to work together in re-aligning their processes for service delivery. Providing a service framework which is simpler, clearer and more accessible by reducing the numbers of websites, front offices and processes will make it simpler for the customer.

- **Developing a website for easy access to information and for easy transactional use**
Ensuring that the web supports easily accessible information and allows efficient self access and self resolution of enquiries, to complement the wider strategy of offering a channel of choice for the customer. This will include a focus on shifting service user preference to this access route wherever practical.
- **Making better use of customer information held**
Establish and maintain a framework for data exchange and customer authentication within the guidelines of Government Connect.
- **Making best use of our Libraries and One Stop Shops**
Using our libraries and One Stop Shops as key face to face access channels for both the delivery of this strategy and development of their respective services.
- **Linking local and central government**
Ensuring that public service delivery is joined up across both local and central government. Working with partner organisations to offer the customer a single point of contact wherever possible.
- **Engaging frontline staff**
Listening to frontline staff views on improving customer contact. Providing processes and systems to enable them to simplify service delivery.
- **Measuring our success.**
Establishing key performance indicators measuring customer satisfaction, repeat contacts and cost of service. We will report on these and use them to develop and refine strategy.

5. GOVERNANCE

- 5.1. The Chief Officers Executive Team recommends policy options and implications to Cabinet and is responsible for implementing Cabinet decisions. They delegate responsibility for delivery and progression of the Customer Access Strategy to the Director of Finance.
- 5.2. The Customer Services Board consisting of the Director of Finance (Ian Coleman) and Head of Revenues, Benefits & Customer Services (Malcolm Flanagan) will ratify priorities and act as arbitrator in response to escalations. The Board reports on the work via the Strategic Change Programme and ensures it links to corporate programmes.
- 5.3. The day to day responsibility for delivery and developments of the front line contact areas lies with the Call Centre Manager (Andrea Bruffell), Customer Service Manager (Julie Williams) and will also involve the lead officer from Libraries.
- 5.4. The Customer Service Development Team is responsible within Customer Services for delivery of the agreed priorities in consultation with appropriate stakeholders.

6. PRIORITY FOR REDUCING COSTS

- 6.1. We understand which the most costly access channels are, so the more information available via the internet and able to be concluded without intervention or mediation will lower the cost of providing the service.
- 6.2. Increased value is more likely to be achieved by transactional online services. For this change to be successful we need to gain and retain customer trust in using our electronic self-serve provision for reassurance of its security, privacy, swift response and ease of use.
- 6.3. Efficiencies are also achieved by separating customer facing duties from skilled back office functions, allowing experts to concentrate on specialised work, and trained customer care operatives to deal with the public using their expertise.
- 6.4. There is a need to reduce avoidable contact which is both indicative of poor service offered to the customer and additional, unnecessary costs to the council. It is defined as including but not restricted to:
 - Customers contacting us again as we have got it wrong or they are not satisfied with our response.
 - Customers having to contact us regarding information we already hold.
 - Repeat contact due to the customers not being told the length of time for resolution of their enquiry or being unable to check progress via self-service options.
- 6.5. Reducing avoidable contact will in turn reduce resource requirements and generate savings. Nearly all repeat contacts can be avoided by effective resolution at the first point of call, taking a 'right first time' approach to dealing with customer contacts. In addition a customer will tend to escalate an unsuccessful contact to a more expensive access channel.
- 6.6. Encouraging customers to access the Council's services via the telephone reduces costs over more expensive methods. To do this we continue to ensure that the telephone service is easily accessed and responsive. This is best achieved by maximised use of the authority's Call Centre.
- 6.7. We continue to review services to ensure where possible transactions are carried out and completed by the cheapest appropriate contact method. We will use the appropriate systems to share information and evidence between departments, thus reducing the need for unnecessary paperwork.
- 6.8. In line with government and local policy and directives we will look to use face to face as a focus of linked public service, improving the overall service to local communities and minimising costs whilst using such sites to encourage self access and maximise their potential as staff hubs for agile working.

7. WORK PLAN

- 7.1. There is ongoing work implementing a range of projects which underpin our Customer Access Strategy principles. A regularly reviewed update of new and ongoing service reviews is reported to Cabinet in the appropriate cycle of meetings.

KEY MESSAGES

1. We will help increase customer satisfaction and be responsive to internal and external customers.
2. We will have choice in access channels, which are joined-up and co-ordinated.
3. We will increase the number of services delivered by the Front of House by identifying those services most appropriate to this channel.
4. We will increase partnership working.
5. We will offer the customer a single point of contact wherever possible.
6. We will be effective, efficient and offer value for money services.
7. We will help decrease duplication in working practices and help services cut overall costs.
8. We will have a fully accessible internet offering transactional services.
9. We will promote self-access to encourage the take up of cheaper channels.
10. We will exploit our Service Delivery System and increase integration of IT systems.
11. We will support a 'right first time approach'.
12. We will rationalise public reception and access points and this will focus on merged Library and One Stop Shops facilities.
13. We will support the use of generic email addresses wherever possible.
14. We will continue to give full focus to received written communication.

FUNDAMENTAL PRINCIPLES

- The Customer Access Strategy is a key part of the overall change agenda as well as being one of the cornerstone projects of the efficiency plan.
- Ongoing change will focus on both front and back office change to maximise efficiencies.
- Setting out the clear need for resolution at first point of contact wherever possible to minimise repeat or avoidable contact.
- Re-stating the ongoing drive to ensure customer access channels handle service contacts.
- Ensuring that all services that engage in change have improved efficiency and value for money as an outcome.
- Clearer focus on developing and utilising the web as a low cost self access and transactional contact channel.
- Providing customer choice and encourage customers and service users to utilise the cheapest appropriate access channel.
- Equality and Diversity expectations will be met through all access methods.

STRATEGIC ACTIONS

- Learning from citizens and businesses to inform service delivery.
- Grouping services in a way that is meaningful to the customer.
- Rationalising services for efficiency and service improvement.
- Developing a web for easy information access and transactional use.
- Making better use of customer information held to continually review service delivery effectiveness.
- Linking local and central government and partner organisations.
- Supporting, Engaging and motivating frontline staff to deliver excellent customer service.
- Measuring our performance to ensure effectiveness.
- Merging contact points such as Library receptions and One Stop Shops for efficiency and service improvement

The table below shows the role of the Customer Access Strategy in contributing to the objectives and delivering the priorities of the Council.

Corporate Objective	Role of Customer Access Strategy
Your Council	<p>The Customer Access Strategy primarily focuses on this objective by:</p> <ul style="list-style-type: none"> • Promoting and improving Ease of contact/Dealing with contacts quickly/Resolving on first time contact/Providing a consistent high quality service. • Providing a variety of contact points (Call Centre/ Libraries/ OSS/ Web/ Text SMS). • Encouraging use of cheapest appropriate channel for the contact being made. • Adhering to Customer Care Standards which publicly show our standards. • Linking this strategy to all the Authority's change plans. • Maximising efficiency through corporate front office access channels. • Reducing avoidable or repeat contact. • Ensuring all change shows improved efficiency and value for money. • Ensuring equality and diversity issues in Access to Services are met. • Grouping services in a way that is meaningful to customers. • Making better use of information held by us. • Linking local and central government and partner organisations to maximise efficiency and service standards. • Supporting, engaging and motivating frontline staff to deliver excellent customer service • Measuring our performance to ensure effectiveness • Merging contact points such as Library receptions and One Stop Shops for efficiency and service improvement • Striving to continually develop the standard and level of service required by its residents .this has been achieved by • Providing choice of access to services through a choice of channels, the call centre, one stop shops and web • Exploring collaborative working as an example provide HMRC presence at the one stop shop • Ongoing work to achieve the customer excellence standard and continue the improvements recognised by successive awards of Customer Service Excellence • Contributing to achieving excellent level of Equality framework for Wirral council • Customer services provide value for money via service re engineering call centre contingency support , and collaborative working achieving a holistic approach to service delivery • Implementing a customer satisfaction programme including mystery shopping , focus groups and customer surveys • Increasing customer satisfaction and responsiveness to internal and external customers

Corporate Objective	Role of Customer Access Strategy
Your Council (continued)	<ul style="list-style-type: none"> • Encouraging use of cheapest appropriate channel for the contact made by use of intelligent online forms on the web • Increasing services delivered by the Front of House • Increasing partnership working • Making the service offered to customers more effective, efficient and provide better value for money • Decreasing duplication in working practices • Increasing first point of contact resolution • Providing experienced, fully trained staff on front line who adhere to the Customer Care Standards • Meeting the equality and diversity standards • Linking to central government bodies, agencies and voluntary sector to maximise efficiency and service standards • A new website which is more user-friendly enabling the Council to deliver more services online: • A simplified structure to make it easier to find information with updated content • A 'Do it online' section to show customers which services they can access through the website • Accessibility tools for people who are partially sighted • The ability to share pages on social networking sites • A feedback facility on every page
Your Neighbourhood	<ul style="list-style-type: none"> • Our sites are used to promote regeneration initiatives such Live Wirral, CRed, Landlord Accreditation, Home Insulation scheme • Supporting ongoing recycling initiatives and providing advice to customers around these issues. • Customer Service attendance at Fuel Poverty Forum. • All sites audited in line with Environmental Management Systems (EMS). • Promotion of Road Safety initiatives at all sites. • Customer Services representation at Hate Crime forum. • Our work with the Local Police through the Neighbourhood Action Group and individual networks to assist with local policing issues raised by residents. • Support for neighbourhood plan applications • Host cop shop at Eastham and West Kirby staffed by volunteers

Your Family.

- Teen Wirral (www.teenwirral.com) is our new website for 13 to 19 year olds. The site contains information about activities and advice for young people. It can help to improve attitudes; build social, emotional and communication skills; help young people to improve their confidence and self-esteem
- We promote the advantages of the work of Response, who will help with any welfare benefits entitlements and also Connexions regarding further education opportunities.
- We offer appointments for Arch Initiatives
- We also promote Wirral Personal Social Services Young Carers scheme, who provide regular activities for young people with carer responsibilities
- Promotion and referral to WIRED Wirral parent partnership scheme providing support and advice to parents whose children have additional education needs.
- Promotion of council's Invigor8 initiative.
- Working in partnership with the NHS for a "Smoke Free Wirral" as customers are encouraged / supported with programmes to "quit".
- Wirral Alcohol Services Harm Reduction Team uses our One Stop Shops on a surgery basis to see clients. A number of our staff are trained to the same level as pharmacists / health centre staff to be able to refer directly into Harm Reduction Team scheme.
- Health and Wellbeing Team delivering Health & Lifestyle surgeries at One Stop Shops.
- Surgeries run by Wirral Change in One Stop Shops to improve outcomes in respect of the BME community.
- Host the Health Action team's mobile information trailer outside One Stop Shops venues.
- We also work with NHS Wirral's Health Trainers to help people start making healthier lifestyle choices and improve their own health through support and offering free lifestyle assessments. OSS facilitate Health Trainer surgeries at sites situated within the Health Action Areas and proactively promote the initiative offering to make a referral to the Health trainers if an underlying health issue is identified.
- The OSS host surgeries delivered by Age Concern.
- Delivery of the tell us once service so those most vulnerable need only see a skilled advisor once and their information will be shared with a number of government agencies.
- Moneyline debt advice surgeries and access to credit unions
- Wirral parent partnership scheme for advice over children's additional needs around education

Appendix 2

This information details current service availability and level of access through the council's website, confirming the scope of future re-engineering projects that could be undertaken.

Services displaying (non-transactional) e-forms on the web	Services displaying static forms on the web	Services without e-form presence on the web
Abandoned Vehicles	Allotment - Application Form	Adoption
Abnormal Loads	Benefit Fraud - Reporting Form	Anti-social behaviour
Access to Information	Blue Badge - Application Form	Archive Service
Advocacy and Advice Services	Civic Hall - Enquiry Form	Arts and Museums
Access Protection Marking	Birth/Death & Marriage Certificate - Application for copy	Business Rates
Benefits Calculator	Demolition service - Application	Car parks Council operated
Bridges	Free School Meals - Welfare Benefit Application Form	Children's Services
Bridge Strengthening	Gambling - Application Form	Choosing Schools
Bulky Collections	High Hedges – Planning	Consultations
Business Rates – Occupation	Housing or Council Tax - Appeal Form	Council Budgets and Spending
Business Rates – Vacation	Housing Benefit - Welfare Benefit Application Form	Country Parks
Business Rates – Transfer	Housing Benefit – Change of Address Form	Day Care Services
Cable Laying	Invigor8 - Application Form	Day Nurseries
Car Parks	Job - Application Forms	Development control
Car Sharing	Land Charges (Searches) - Application Form	Environmental Health
Child Protection	Landlord - Application Form	Environmental permits
Coastal protection – Inspection	Licence - Application Forms	Erecting a hoarding or scaffold on a public road or pavement
Coastal protection – Maintenance	Road Closures - Application Form	Finding Childcare
Complaint	School Admissions Appeal Form	Free Sport Passes

Services displaying (non-transactional) e-forms on the web	Services displaying static forms on the web	Services without e-form presence on the web
Council Tax Banding reduction	Small Business Rate Relief - Application Form	Free swimming
Change of Address	Teaching in Wirral	Walking and Cycling
Single Person's Discount	Temporary Events Notice - Application Form	Golf in Wirral
Council Tax Student Exemption	Tree Preservation Orders	Housing advice
Culverts	Voting - Postal Vote Application Form	Information for Parents and Carers
Cycle Training	Wirral Passport Scheme - Application Form	Invigor8
Dangerous Road Junctions		Jobs
Demonstrations & Parades		Learning Centres
Dropped Kerbs		Leisure Centres
Event Hosting Permission		Nursery Places
Excavation		Outdoor Sport, Park Activities and Events
Fly posting		Parking
Flytipping		Parks, Beaches, Greenspaces & Countryside
Garden Waste Collection Scheme		Playgrounds, Wheelparks & Multi-use games areas
Graffiti		Playspaces
Highway Enforcement		Pre-School Playgroups
Household Waste (Assisted Collections)		Primary School Places
Household Waste (Collections)		Ranger Service
Household Waste (Missed Collections)		Register a Birth
Housing Benefit – Fraud Referral		Registering a Death
Job Applications		Registering a Marriage
Licence – Animal Movement		Request for Alternative Format
Lost Pets		School Information and Advice
Obstructions		School term dates
Parking Appeals		Secondary School Places
Parking Permits		Sport and Leisure Memberships
Pavement Crossing		Sports Centre Locations

Services displaying (non-transactional) e-forms on the web	Services displaying static forms on the web	Services without e-form presence on the web
Pavement Parking		Stray dogs
Pedestrian Crossing		Swim Wirral
Pedestrian Rails		Tourism
Performance Indicators		Trading Standards
Personal Injury		Truancy
Pest Control		Youth and Play
Pollution Control		
Refuge Island		
Salt – Purchase		
School Crossing Patrol		
Skip Permit		
Speed Limits		
Street Care and Cleansing		
Street Lighting		
Street Parking Fines		
Street Parties		
Sunday Trading		
Temporary Road Closures		
Traffic Calming		
Traffic Lights		
Traffic Management		
Traffic Schemes		
Travel Plans		
Verge Maintenance		
Walking Guides		
Walls – Dangerous		
Website – Accessibility		
Weight Limits		
Yellow Lines		