# JOINT OVERVIEW AND SCRUTINY TRANSITION BOARD 27 FEBRUARY 2009

# **CUSTOMER ACCESS TASK GROUP**

# **FINAL REPORT**

# **Purpose of Report**

 To present the Customer Access Task Group's final report to the Joint Overview and Scrutiny Transition Board (JOSTB). The report details the key findings and seeks the Board's endorsement of a number of recommendations, to both the Implementation Executive (IE) and the appropriate Wiltshire Council scrutiny committees. These recommendations are to be submitted to the IE at the determination of the JOSTB.

# **Background**

- 2. The Customer Access task group was asked to consider the following customer access arrangements provided across Wiltshire in order to identify:
  - a) current service access arrangements, standards and performance;
  - b) desired customer access arrangements, standards and performance for the new Wiltshire Council:
  - c) any anticipated issues or problems associated with the transition to the new Wiltshire Council;
  - d) to recommend to the Implementation Executive preferred customer access arrangements for the new Wiltshire Council.
- 3. In addition to considering the above, the Task Group provided a monitoring role for the developing *Customer Access to Services Strategy*<sup>1</sup>. This was achieved by checking weekly the Critical Path updates and receiving the minutes from the Critical Path Task Group. John Rogers updated the task group on the progress of the Customer Access targets at the task group meetings.
- 4. At the later request of JOSTB, the Task Group also examined the underlying structures essential to the successful delivery of this project. This was the reassurance that systems thinking had been applied, the efficiencies outlined in the original bid would be made and that the progress of the IT backbone and telephony installations was monitored.

<sup>1</sup> Rogers, John [9.06.08], Customer Access to Services Strategy: 1 April 2009 to 2012, Version 1.0

- 5. The Task Group also chose to examine the provision of customer service training and the marketing campaign that would raise public awareness for the new council's access arrangements.
- 6. Towards the end of the review, the issue of how members' enquiries would be handled by the new council was raised. JOSTB requested that the Task Group investigate this subject which they did at their final meeting and is addressed in paragraphs 67-72.

# **Programme of Meetings**

7. The following members and officers were present at the Task Group's meetings:

9 April 2008 Scoping the Review: Jo Broom SDC, Geoffrey Carr WDC,

Sylvia Doubell NWDC, Mollie Groom WCC, Anthony Lake KDC, John Rogers (WCC Customer Focus Lead), Marie Todd (Senior Democratic Services Officer) and Julia Densham

(Democratic Services Assistant)

6 May 2008 <u>Witness Interviews</u>: Anthony Lake KDC (Chair), Jo Broom

SDC, Geoffrey Carr WDC, Sylvia Doubell NWDC, Mollie Groom WCC, J Rogers (WCC Customer Focus Lead), Frank Coleman (WCC Customer Care Manager), Angus Doulton (Project Consultant), Mark Edwards (NWDC Customer Contact Centre Manager), Heather Lovelock (KDC Reception and Advice Team Manager), Wayne Smith (WWDC Customer Services Manager), Jo Mundy (SDC Customer Service Manager), Jackie Tavener (NWDC Head of Customer

Relations and Customer Contact Centres Project Lead), Marie Todd (Senior Democratic Services Officer) and Julia Densham

(Democratic Services Assistant)

3 June 2008 Preparing the Access to Service Strategy: Anthony Lake KDC

(Chair), Geoffrey Carr WDC, Mollie Groom WCC, John Rogers

(WCC Customer Focus Lead), Mark Edwards (NWDC Customer Contact Centre Manager) and Marie Todd (Senior

Democratic Services Officer)

2 September 2008 Efficiencies and Systems Thinking: Anthony Lake KDC (Chair),

Jo Broom SDC, Mollie Groom WCC, John Rogers (WCC Customer Focus Lead), Deborah Farrow (Director of Business Transformation) and Marie Todd (Senior Democratic Services

Officer)

24 November 2008 Customer Care and Training: Anthony Lake KDC (Chair),

Geoffrey Carr WDC, Mollie Groom WCC, John Rogers (WCC Customer Focus Lead), Jacqui White (Director Shared Service Team and Customer Care) and Marie Todd (Senior Democratic

Services Officer)

26 January 2009 Communications and Members' Enquiries: Anthony Lake KDC

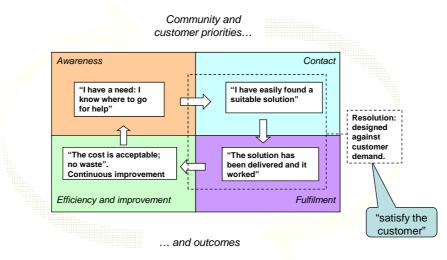
(Chair), Mollie Groom WCC, Allison Bucknell NWDC (IE Portfolio Holder: Democratic Services), John Rogers (WCC Customer Focus Lead), Sally Hendry (WCC Campaigns Manager), Marie Todd (Senior Democratic Services Officer) and Julia Densham (Democratic Services Assistant)

# **Preliminary Evidence**

# **Customer Access Vision**

8. At the Task Group's first meeting on 9 April 2008, the review was scoped and witnesses were chosen to provide the members with background information necessary to understand the desired customer-centred approach. This is illustrated below:

# Customer-focused service journey



Model developed by local authorities (including Wiltshire partners) in the EiP group (www.eipdg.org.uk)

- 9. The customer access vision was to develop a customer-centred approach to the delivery of Wiltshire Council services. This process is illustrated in greater detail in the Appendix. A proposed charter of customer service ideals had been created, outlining its expectation of customers and staff. This was followed by an analysis of the changes required to meet this objective, the centres of excellence that already existed and should be built upon and finally the challenges of service delivery in some areas given the large rural characteristic of the county of Wiltshire.
- There is a need for officers to see themselves as part of a single culture with a
  personal responsibility to the customer, rather than as specialism-driven
  individuals.
- 11. The facilities for customer access (face-to-face service, web-site, email and telephony) must be in place by 1 April 2009 and be uniform centrally and in the hubs across Wiltshire.
- 12. Technology needs to be extensively utilised to extend the Council's 'opening hours' which will encourage as many customers as possible to take advantage of internet and telephone payment facilities, while those who did not have

such access should be equally well-served. This will include the facility to receive cash payments where absolutely necessary.

# **Other Authorities**

- 13. There is a need to find a balance between bringing people to the service versus the service to the people. An examination of three model authorities East Riding, Leeds and Sheffield was conducted by the Customer Focus project team to better understand the varieties of service delivery.
- 14. East Riding was of particular interest to the Task Group given its similar size and geographically rural characteristics. The local authority had set up a variety of network links so that customers could access council officers and services from their own homes, libraries and enquiry points in local shopping centres.
  - a. 14 customer service centres had been created offering access to customer advisors in a semi-private space and offered direct contact with back-office personnel via video link, telephone, internet and e-mail.
  - b. 19 Citizen Links offered face-to-face service on the customer's doorstep via video conferencing with links to partner organisations such as hospitals, police, JobCentrePlus and legal services.
  - c. Enquiry Points provided access via a 'hot phone' link to council services.
  - d. Mobile access centres were provided through library and rural access vehicles with 'hot phone' links to the council.
- 15. Authorities in Warwickshire, Malvern and Ashford were also considered and the option of using web-cams in popular locations such as shopping centres was favourably considered by the Task Group.
- 16. The provision of duty officers in the hubs to cover areas such as planning and social care is considered to be extremely important by the Task Group. In the case of social care, those in crisis or needing sustained support should be equally well-served at the hubs, increasing the range of services available at the local level.
- 17. To this end, this report will make recommendations to consider technological solutions by way of bringing services to those without internet access or who prefer a face-to-face service, that 'opening hours' are extended to better reach a wider section of the population and that duty officers are provided, in each of the hubs, to ensure service provision for Wiltshire's most vulnerable customers.

# <u>Customer Service</u>

18. At its second meeting on 6 May 2008, the Task Group invited the Customer Services Managers from each of the five authorities to share what was considered well done and what could be improved in each of their own authorities. The Customer Service Managers from each authority were consulted:

Heather Lovelock	KDC Reception and Advice Team Manager
Mark Edwards	NWDC Customer Contact Centre Manager
Jackie Tavener	NWDC Head of Customer Relations and
	Customer Contact Centres Project Lead
Jo Mundy	SDC Customer Service Manager
Wayne Smith	WWDC Customer Services Manager
Frank Coleman	WCC Customer Care Manager

- 19. The main outcome of these interviews was to identify that each Customer Service Manager had an excellent understanding of their own authority's problem areas and had indentified what worked really well. These Managers had also worked together for several years and considered there to be a strong will to work in partnership. They had a clear vision of the future customer access arrangements.
- 20. The Customer Services Managers' main desire was to implement the new service early, which would include team-building and training, and the installation of various IT solutions, to allow for a joined-up service. However, discussions with Richard Woodroffe, Director of Human Resources at Wiltshire County Council, concluded that for various legal reasons, this would not be possible.

# 21. Strengths of the five authorities included:

- Wiltshire County Council's strength was the authority's single telephone number that was answered by a person rather than via Integrated Voice Response technology;
- b. Kennet District Council had analysed their customer base in order to deliver service locally through libraries;
- Salisbury District Council followed a peripatetic-style of service delivery due to the rural nature of the district and this function could be applied in other hard-to-reach areas. This operated through a staff rota. Salisbury District Council also had a well-defined career structure for its customer service officers;
- d. at North Wiltshire District Council, the facility for delivery of Revenues and Benefits, Homelessness and Planning was well-served by the Reception area and staff. Also at North Wiltshire District Council, customer satisfaction was monitored on the web-site, kiosk and telephones to gain instant feedback from the customer; and
- e. West Wiltshire District Council had great success with their Welcome Officer to signpost customers.

#### 22. Weaknesses of the five authorities included:

a. Wiltshire County Council's Reception required a redesign and needed to establish a better liaison with service areas. While visitors arriving for meetings at County Hall were well-served, 'off-the-street enquiries' needed substantial improvement with possibly a separate service area

- for confidential issues. This issue was considered particularly problematic and led the Task Group to make recommendation (f);
- b. Salisbury's offices were inadequate with queues sometimes reaching from the reception area to the street. A similar backlog forms within their telephony system. This issue, however, has been overcome by the acquisition of new premises for Customer Service provision in the city centre; and
- c. West Wiltshire District Council had good facilities but a poorly located building.

#### Baseline of Service

- 23. Mr Angus Doulton, a consultant from CDW & Associates Ltd, was asked to help build a consensus about customer focus, first with the key stakeholders involved within the Local Government Reorganisation, and then more widely with the project led by Mr Rogers. His brief was to produce a baseline of Wiltshire's customer focus and access to service, against a national framework. This would give rise to a prioritised set of strategies for the implementation of a first-class customer access service in Wiltshire, under the new council.
  - a. Mr Doulton's proposals included both generic solutions to create uniformity in style between the five authorities and specific solutions to meet the more unique requirements of isolated areas. Mr Doulton's brief was to facilitate the development of the *Customer Access to Services Strategy*. He continued to work closely with the Customer Focus group to help identify the desired customer access arrangements, standards and performance for Wiltshire Council.
  - b. Mr Doulton's research illustrated that the volume and complexity of work carried out by District Councils was high and that there was a fear that centralisation would impair service delivery to out-lying areas. The ability to deliver some services from a local point would be highly desirable.
  - c. The five authorities did not cover Wiltshire completely; however, Salisbury District Council was the most progressive in taking services out to the smaller towns.

# Customer Access to Services Strategy

- 24. Members of the Task Group also attended the Implementation Executive Customer Access seminar on 22 May 2008 as an information gathering exercise. Members were asked to comment on the *Customer Access to Services Strategy* proposals at the two time horizons: 1 April 2009 and 2012.
- 25. With respect to the first date, members were asked to consider:
  - a. the choices before them;
  - b. what was proposed that would be different;
  - c. what was being done to safeguard current services and continuity;

- d. the proposals for customer contact channels: location and scope of face-to-face access, telephone channel access, web and email access;
- e. proposals to make the transition work for staff;
- f. the foundations for the future that could be laid.
- 26. Considerations for 2012 included the following:
  - a. customer focus and ideas about a service strategy for sustainable local services;
  - b. developing a more customer-focused culture;
  - c. using customer insight: properly understanding our citizens and communities their ambitions and aspirations;
  - d. working with communities and their representatives;
  - e. service transformation moving the balance towards prevention and being pro-active;
  - f. the difference that customers can expect to see and from when.
- 27. During June 2008, the Task Group considered Mr Rogers' draft *Customer Access to Services Strategy* prior to its submission to the Implementation Executive on 17 June 2008. The Task Group's Chair, Councillor Anthony Lake (KDC), attended the IE meeting with Mr Rogers.
- 28. The *Customer Access to Services Strategy* made a number of recommendations and commitments that included the following by 1 April 2009:
  - a. a consistent face-to-face service covering both district and county services at each of the main locations:
  - b. one main contact number plus 'golden numbers' that would access certain services directly;
  - c. a new web-site that was an effective channel for customer transactions;
  - d. an email service that would go to service inboxes, including where appropriate, e-forms that would capture transactional information at the earliest opportunity.
- 29. By 2012, the *Customer Access to Services Strategy* committed to the following transformational aims:
  - a. implementing more widespread local service access;
  - b. implementing theme or life event-based services at the First Point of Contact across all service areas;
  - c. moving to a service strategy that was pro-active, focusing on prevention and dealing with the root causes of service demand;
  - d. the co-delivery of services which were appropriate to the resources of the diversity of the communities with which the council worked, and which built social capital.
- 30. The IE recommended the implementation of this strategy at its meeting on 17 June 2008.
- 31. The Customer Access to Services Strategy, in its section entitled 'Financial Context', states that 'Transformation to the new model will ... take place in a context of limited funds and capacity. However, this transformation will also

- be the route to the savings which will make our services sustainable, so making and taking opportunities to proceed will be critical.'2
- 32. These transformational aims cannot fall within the limited life of this Task Group; however, recommendation (c) is made to consider a future scrutiny review of the longer term aspirations to evaluate the on-going effectiveness of the *Customer Access to Services Strategy*.

### Face-to-Face Contact

- 33. Customers will be able to access services at the four main offices in Chippenham, Devizes, Salisbury and Trowbridge. Customers will be able to obtain information on any Council service and should be able to talk face-to-face with an expert in the area of their enquiry. There will also be customer service desks in Amesbury, Marlborough Library, Mere and Salisbury Library. At the customer service desks there will be information about any Council service and help to assist customers to contact services and make appointments at the main offices. Customers will also be able to visit other libraries, tourist information centres, town councils (North Wiltshire) and Salisbury City Council. Here, staff will be able to give information and help people to contact services. At County Hall, staff will be able to give information, contact services and make appointments.
- 34. The reception areas aim to be consistent in the style and array of services they offer and will all be Wiltshire Council-branded. The hubs will be Disability Discrimination Act (DDA) compliant and offer language/communication support for non-English speakers and those with communication needs. Staff will receive induction training about the Wiltshire Council's culture and values, along with information on equality, diversity and fairness.

#### Additional Evidence

35. To identify potential issues or problems associated with the transition to Wiltshire Council, several 'specialists' were invited to the Customer Access Task Group meetings to describe the processes that would be applied to achieve the primary aim of the new council, that being the delivery of a first-class customer service.

# **Efficiency Savings**

- 36. On 2 September 2008, the Task Group considered the projected efficiency savings of the Customer Access project. The project had been consistently on target, having met all its milestones to date and was on target to meet the proposed savings.
- 37. Expected savings appear to be consistent with the original bid. The project had achieved its target savings of £200,000 for 2009-10. This was realised without redundancies by workforce planning and by holding some management posts vacant. During the next two years, savings will be achieved mainly by

<sup>&</sup>lt;sup>2</sup>Rogers, John [9.06.08], Customer Access to Services Strategy: 1 April 2009 to 2012, Version 1.0, pp5

- successfully redesigning services from end-to-end so that waste/failure demand falls sufficiently. This will be done using LEAN systems redesign in partnership with the Director of Business Transformation and her team.
- 38. The benefits realisation framework aimed to achieve its targets by 1) the correct design of services and use of technology to eliminate waste demand and 2) by ensuring that service delivery is correct at the first attempt. The team is also currently considering many different types of face-to-face facilities at various locations and this is largely a transformational aim, post-April 2009.

# Systems Thinking

- 39. On 2 September 2008, the Task Group considered a presentation on Systems Thinking by Deborah Farrow, Director of Business Transformation (LEAN/Systems Thinking). This allowed members to better understand the methods that had been employed in the design of the Customer Access project and to verify that Systems Thinking had been applied to the programme design.
- 40. Various types of customer demand had been collected across the County to identify the areas where changes would add the greatest value to services. While LEAN/Systems Thinking had not yet been employed wholesale in England, and therefore the cross-fertilisation of ideas between authorities was not available in time. The Task Group agreed that a highly functioning customer service would improve Wiltshire Council's representation across the board. The key messages are set out in the slide below:

The key messages

# The key messages

- It's the system not the people 95% versus 5%
- · Variation is in everything
- Thinking governs performance systems thinking is counter-intuitive
- Capacity = work + waste
- · The customer sets 'what matters'
- Systems thinking = improved service + lower cost + better morale
- · You have to change the way you think...
- Leadership means understanding and taking action on the system.
- There must be a sustained top down holistic approach to achieve sustainable improvement
- It's not business process re-engineering: it's not about 'tools'
- It's about the way you think (and then act on the system)
- It works with any product or service



improving life in Wiltshire

41. Customer access arrangements are deemed the 'number one priority of the new council.' To achieve this aim via the mechanism of systems thinking, staff perceptions of 'how to best serve the customer' will need to change. While this changing attitude could be initiated via training, there needs to be an

<sup>&</sup>lt;sup>3</sup> Bell, Laurie [21.01.09], Corporate Director: Policy, Performance and Communication: Staff Briefing (NWDC)

- organisational shift of cultural values to achieve the aspirations of a truly customer-centred service. This highly desirable and achievable target could be realised over time with a forward-looking leadership.
- 42. The cost savings promised in the Unitary bid also relied upon the successful application of this methodology. The elimination of waste demand in order to increase output will lead the business transformation of the new council.

# Information Technology (IT)

43. Without a solid IT infrastructure there could be no delivery of services, therefore the evolving IT plans and their issues were scrutinised throughout this review.

Wide Area Network

44. At various stages, different concerns arose and subsided. The Wide Area Network (WAN) installation had been problematic. However, by early February 2009 it was operational in four locations – Chippenham, County Hall, Devizes and Salisbury - and is scheduled to be fully operational by mid-February 2009.

Telephony

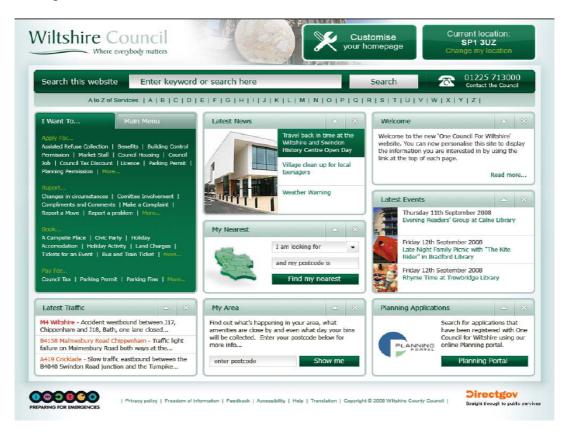
- 45. Telephony will be live for testing and training by mid-February 2009.
- 46. Existing Council telephone numbers will still work and the new direct dial numbers will be promoted to enable immediate access for customers.
- 47. The main number 0300 4560100 is now live and will be answered by Customer Services Officers at Wiltshire County Council until the new council comes into being. There will also be main service numbers for social care, elections and voting, automated payments and an emergency/out of hours service. The numbers will be listed in an A-Z booklet and on the website.

LAGAN

- 48. In December 2008 and January 2009, the responsible ICT officers responded to the scrutiny officer's questions regarding the readiness of the customer relationship software LAGAN. This was confirmed for the third week in February.
- 49. It is now considered that, while a clean version of LAGAN was ready and would work adequately, a superior option would be the purchase of interface software to speed up the loading of addresses from property gazetteer, thereby enhancing the customer experience. The issue had been discussed at the Critical Path Task Group meetings and a solution has been proposed by Mr Rogers. This is considered under recommendation (d).
- 50. Separate LAGAN archives will be available in each Council for past enquiries.

#### Web-site and Email

- 51. The design of the new Wiltshire Council web-site emulates the intuitive characteristics of the BBC web-site with 80% of customers' needs signposted from the front page. The focus is on customer transactions that offer a variety of ways to apply for, pay for, report and book services. This design also allows users to customise the main page to best reflect their service preferences and requirements.
- 52. In December 2008 and January 2009, the responsible ICT officers responded to the scrutiny officer's questions regarding the readiness of the web-site. It was considered almost complete and in the testing stage with a beta version of the site available by the end of February. The new look web-site is shown below.
- 53. Email functionality is in place with interim emails for co-opted District Members arranged.



# **Customer Care and Training**

- 54. On 24 November 2009, Jacqui White, Director for Shared Service Team and Customer Care, gave the Task Group an update on the Customer Care team and their training, and described the strategies in place to achieve Day One targets.
- 55. A 'super spreadsheet' that documents the top 500 transactions and the access arrangements has been created. The spreadsheet provides a detailed service baseline across all services and enables the identification and resolution of any access gaps by 1 April 2009.

- 56. Customer care scripts and training will focus initially on high volume, high impact services including waste, revenues and benefits and development control. A large proportion of scripts were available for training purposes at the end of December and scripts are consistent and linked to the web pages. Training for the Customer Services Officers will take place, in the main, between mid-January and mid-March.
- 57. The Director of Shared Service Team and Customer Care confirmed that essential access will be in place by 1 April 2009. These included one consistent service merging all front desk services, telephony (one main number plus golden numbers) and the web (a brand new website with all current web transactions being brought forward). Existing Council numbers will still work.
- 58. 90 out of 120 Customer Services officers have already attended a very successful team-building day.
- 59. There is an arrangement to direct customers between the Bradley Road offices and County Hall based on the type of enquiry made. The following criteria will be applied:
  - a. Can the information be provided either on the spot at the terminal in reception?
  - b. Can the customer use a phone in reception to talk to the person they need?
  - c. Would it be better for the customer to go to Bradley Road?
  - d. Would it make sense for an officer to come from Bradley Road?

### Publicity Campaign

- 60. The Task Group held its final meeting on 26 January 2009 to consider the Communications Campaign that will promote the new council and also the JOSTB request to review the manner of handling members' enquiries.
- 61. Sally Hendry, Campaigns Manager at Wiltshire County Council, updated the Task Group on the promotional ideas and events that are planned to advise customers across Wiltshire of the changes. Customers will also be shown how to access the variety of Council services under the new arrangements.
- 62. The 100 day countdown is underway and includes a photo competition for staff and members of the public. Prizes have been donated by the Chippenhambased Fleet Support Group.
- 63. A road show that promotes the new council will travel throughout Wiltshire during February and March. The re-branded Wiltshire Council publicity trailer will be used in the market towns and larger locations, whilst library exhibitions had been arranged for smaller areas. An out-of-service mobile library has been converted for use as an exhibition space and will continue to be used

after transition for publicity events. The road show will be manned by communication officers, senior officers and area board officers, all of whom will be given a comprehensive briefing. A questionnaire had been designed to assess individual knowledge of the new council through the road shows. On completion each questionnaire will be entered into a draw and a Champagne Balloon Flight is offered as the prize. A new range of newsletters and leaflets have also been produced for the event.

- 64. The transition to Wiltshire Council has been advertised in a variety of ways including press releases, the extranet and all five council web-sites. GWR and Spire FM have agreed to promote the road shows and in some cases will be attending them. All advertising methods will be evaluated in terms of effectiveness by the Communications Team. Posters and pop-ups have been produced for libraries and leisure centres. An 'A-Z of Services' has been compiled for distribution throughout the county at points of sale, as part of an intensive media campaign. New council phone numbers will be available on the web, Denton's directories, in the A-Z and on all council literature. A promotional event is planned at each location on 1 April 2009.
- 65. A DVD has been produced in-house at Kennet District Council to promote the new Council, explaining the unitary authority and contact methods. This will be linked to all the authorities' web-sites. A monthly newsletter has been sent to all town and parish councils.
- 66. All these events have been funded from the Communications Transition Budget.

# Members' Access to Officers

- 67. Councillor Allison Bucknell, IE Portfolio Holder for Democratic Services, addressed the Task Group, at the request of the Joint Overview and Scrutiny Transition Board, on the processes by which members' enquiries would be handled by the new council.
- 68. Until now, and due to their councils' comparatively small size, District Council members have been able to access officers directly. However, the new council will incorporate all County and District services and access to individual officers for general enquiries will not be the most efficient method of working. Many enquiries are repetitive questions that, if dealt with by Customer Care unit officers, will result in a more timely and cost effective response. Additionally, due to its ad hoc nature, member enquiries at the district level are not currently monitored for efficiency, nor audit trails created. Wiltshire County Council already uses a tracking system that is considered effective. Councillors' enquiries will, however, be handled differently to public enquiries and councillors will still be referred to senior officers for more complex matters.
- 69. Email access by members is considered to be more efficient and a contact directory will be available on the intranet. It was currently in testing and will eventually be linked to SAP employee records to keep it up-to-date.
- 70. All written communications will state the officer responding as the customer's named contact rather than the existing practice of including the corporate director.

- 71. John Rogers met with the Head of Democratic Services to discuss the handling of members' enquiries and it is hoped that this topic would be included in the member induction programme, scheduled for early June.
- 72. The strategy for handling members' enquiries is informed by systems thinking that aims to get the right person at the right time at the right level. It should be noted that this is not an attempt to prevent members from contacting individual officers but to encourage the efficient use of officer time. It was acknowledged that, as member/officer relationships evolved in the new authority, members will approach certain officers directly for more detailed queries. The Task Group was content with the proposals outlined by Cllr Allison Bucknell.

# Critical Path Monitoring

- 73. From November 2008, the Task Group monitored the development of the Customer Access project via the Critical Path Documents and meetings. The following issues were raised and are now on target for completion by the required timescale:
  - a. the main telephone number is live and answered by the Wiltshire County Council Customer Care Unit;
  - b. all the customer services scripts are complete;
  - c. staff training groups are working on standardising salutations and valedictions. Full training will commence on 20.02.09 with two days training per location and will be finished by 13.03.09; and
  - d. the Salisbury Customer Centre will be open for business in early April. This will be 1 April 2009 provided the progress of the refurbishment work continues with no further issues.

# **Next Steps**

- 74. The recommendations in this report, if accepted, will be considered by the Implementation Executive on 11 March 2009.
- 75. This report concludes the work of this task group. The Chair, Councillor Anthony Lake would like to thank all the members of the task group, the various witnesses and heads of service who fed back comments and ideas during the review.

#### Conclusions

- 76. The working relationships developed between the Consultant, Customer Focus Lead and the Customer Service Managers provided the Customer Access project with a strong platform to deliver the transition and transformation of its service and the project delivery is on target, with respect to its set timescales.
- 77. Technological solutions should be implemented to extend the Council's 'opening hours' and encourage as many customers as possible to take

advantage of internet and telephone payment facilities. However, those who do not have such access should be equally well-served through the use of network links, such as webcams and 'hot phones', which will enable services to be delivered to the customer at a more convenient location.

- 78. The provision of duty officers in the hubs, particularly in the field of social care, is critical to the effective delivery of those services at the local level.
- 79. The project is close to achieving its target savings of £200,000 for next year. This has been achieved by workforce planning and by holding some management posts vacant. In the next two years savings will be achieved mainly by improving processes and staffing.
- 80. LEAN systems thinking has been applied to the new customer access arrangements.
- 81. Satisfactory arrangements are in place to publicise the new customer access arrangements for the new Council.

#### Recommendations

- 82. The JOSTB is asked to:
  - a. Endorse the final report of the Customer Access Task Group.
  - b. Note that the following commitments set out in the Access to Service Strategy will be in place by 1 April 2009:
    - a consistent face-to-face service covering both district and county services at each of the main locations;
    - ii. one main contact number plus 'golden numbers' that will access certain services directly;
    - iii. a new web-site that is an effective channel for customer transactions; and
    - iv. an email service that will go to service inboxes, including where appropriate, e-forms that will capture transactional information at the earliest opportunity.

Consider, as a future scrutiny topic, the transformational aims of the *Customer Access to Services Strategy* as set out in paragraph 29(a)-(d).

- c. Recommend the implementation of high quality interface software to enable smooth loading of customer addresses from the property gazetteer NPLG to LAGAN to improve customer experience, reduce the time taken in transactions, and increase the accuracy of records.
- d. Consider investigating, as a transformational aim, alternative methods of Customer Access via technological means located at area hubs, for

- example, Webcams and 'hot phone' links, for hard-to-reach customers and areas.
- e. Recommend the redesign of the County Hall reception area in Trowbridge to present a more customer-friendly image in its provision of services.
- Recommend the review of opening hours for service by both face-toface and telephony channels to better match customer preference and demand.
- g. Recommend the provision of a plan for providing face-to-face services to the Council's most vulnerable service users, from 1 April 2009.

Councillor Anthony Lake
Chairman – Customer Access Task Group

Report Authors: Marie Todd and Julia Densham, Democratic Services - NWDC

