



# **Customer Services Task and Finish Group Report December 2022**

## Introduction and background

The Council has responded to the COVID-19 pandemic by continuing to change how it operates. This has come after a sustained period of reduced government funding for all councils.

Councillors are concerned to ensure that interactions with residents are as effective as possible from the perspective of residents and understand how the Council's Customer Focused strategy has continued to evolve through the pandemic.

The recent local government reorganisation announcement means that Allerdale Borough Council will be replaced by a new unitary local authority in 2023 covering the footprint of Allerdale, Copeland and Carlisle councils. It will be important to consider this context in relation to this review both in terms of transition to the new authority and how it plans to operate in the future.

Overview and Scrutiny Committee agreed to set up a Customer Services Task and Finish Group at their meeting on 24 June 2022 and agreed the review scope. The Group met during September-November 2022.

In line with an established approach to involve the wider membership in task and finish group work, all non-executive members were given the opportunity to join this group.

The Task and Finish Group membership consisted of:

- Councillor Malcolm Grainger (Chair)
- Councillor Allan Daniels
- Councillor Barbara Cannon
- Councillor Andrew Semple
- Councillor Peter Kendall

## Review scope

The review was intended to focus on the following:

- To consider the impact on residents of appointment only and digital by default models of customer service
- To consider how public service delivery hubs as 'one stop shops' for public services can be delivered, as detailed in the economic growth strategy.
- To hear directly from customer service staff on the needs of residents

The intention was that the review would identify recommendations that can either be implemented by Allerdale Borough Council in the short term or carried forward as recommendations for the new unitary authority to consider.

## Customer services in Allerdale

The Group split their work into two parts. The first part was a detailed briefing session with Paul Wood, then Programme Director, Transformation & Operating Model with responsibility for Customer Services function followed by a question and answer session. The second session was a visit with front line Customer Services staff and an opportunity to listen to customer calls with Phil Hughes, Manager – Customer & Fulfilment, Transformation & Operating Model.

At the first meeting, the Group considered the latest report from the Director with details of a mystery shopper exercise (See appendix 2) and update on staffing. The Task Group heard that staffing levels had been through a challenging period with key staff moving on. Recruitment had been successful and by the time of the visit to customer services, staffing was back to its full compliment. A key finding was that staff calendars need regularly updating to ensure that customer service teams can easily see when and where service staff are to answer detailed questions, for example a member of staff may be on annual leave or undertaking training. This feedback has been shared with service managers.

The council Customer Strategy (Appendix 1) sets out that contact with the council should be 'digital by choice', not digital by default, which is what is often used by councils and the government to describe the shift to digital communications and online self-service facilities.

The Task Group discussed the importance of customer service to residents and businesses and how the pandemic had changed how the council operated, with a resultant switch to meeting customer needs through the use of telephone, on-line and bookable appointments. Surveys show customer satisfaction to be good, but that more work on consistency is needed. Allerdale BC always aims to put the voice of the customer first. The customer surveys ask how easy people found it to contact the council, what their preferred contact route was and where they were based. 92% of customers prefer to make contact by telephone and 7% walk in. This would reflect the way that the council operates and does not include the large number of residents who self serve on the council web site. The Council's 'call back' service is much used and very popular, as it ensures a smoother flow of work for customer service staff and enables customers to get on with their day and not wait in a telephone queue.

The Task Group heard about the wide range of services that the customer service team undertake, including taxi licensing. Each service has been asked to provide details of a 'duty officer' to ensure that the customer service team always have a point of contact when they need to reach into a service area for a resident. Staff training was discussed and the wide range of service knowledge that customer service staff are trained in. Training constantly takes place and enables staff to update their skills and knowledge.

Allerdale BC currently has offices in Workington, Maryport (at the newly refurbished Town Hall), Wigton (NADT) and Keswick, though the Keswick office has been closed for the last 2 years. No plans exist to re-open Keswick as a walk-in service however it is available as a location for customers with appointments to meet officers as is Cockermouth Town Hall though this will be subject to the strategy of the new Cumberland Council.

The Task Group agreed that Councillors and Officers have a strong working relationship and share issues and problems openly and honestly to resolve them as quickly as possible. This Task and Finish Group is an example of how Councillors take forward issues of concern to residents. Areas which need further improvement across the council include tracking progress on enforcement or planning issues and sharing this with residents, this was recognised as a complex issue to tackle, but an important principle to work towards.

Councillors were keen to ensure that customer services would not be impacted by the switch to Cumberland Council. It was noted that plans are in place to ensure a smooth transition and ensure that residents will still be able to easily access the services that they need. Discussion took place about the need to communicate effectively and clearly with residents about what would and what would not change. The services that Allerdale Council provides will continue and be unchanged from a resident's perspective.

## Recommendations

The Task and Finish Group makes the following recommendations –

### To Allerdale Borough Council

- R1 The Task Group welcomes the commitment in the Customer Strategy to offer ways of contacting the council that works for the resident, especially the commitment to 'Digital by choice' in contrast to 'Digital by default'
- R2 Work to ensure the high standards that residents expect in customer service are maintained right up to handover to Cumberland Council and into the transition phase of the new authority.
- R3 Residents are kept informed of the impact of the new council and what will change from a resident's point of view trying to contact the council.

### To Cumberland Council

- R4 To adopt a resident focused customer service that offers face to face as well as on-line and telephone contact.
- R5 To ensure every part of Cumberland has good access to face-to-face meeting facilities.
- R6 To continue to offer a customer service ring back service, that avoids the need to sit waiting for an adviser to become available, thus ensuring every call receives the full care and attention it needs.
- R7 To continue with the best practice of mystery shopper exercises and support continuous improvement of Customer Services as currently deployed by Allerdale Borough Council and set out in the Allerdale Borough Council Customer Strategy.

## Appendix 1

### Allerdale Borough Council Customer Strategy

*People when you need to speak to us, technology when you don't*

Councils across the country are facing unprecedented financial constraints; having to make difficult choices with limited resources. The challenge is to reduce costs whilst at the same time improving services to match ever more demanding customer expectations. To meet this challenge Allerdale is committed to delivering an ambitious service transformation programme Government has adopted a digital by default approach to service and has delivered successful transformation improving customer service and reducing costs, the DVLA being a real example of this success, Allerdale is pursuing digital by choice through this customer access strategy. The strategy builds on our drive for continued improvement in customer service through better access to Council information and services. It defines how, in transforming service delivery, we will provide excellent services for our customers and deliver value for money to the taxpayer. The customer access strategy will be underpinned by the Allerdale Information Management strategy outlining the types of information collated by the council, what it is used for and how it is managed securely.

Customer Strategy The strategy aims to deliver the things that are important to our customers:-

- Accessible and easy to use services
- Services that do what they say they'll do, when they say they'll do it
- Reduced costs and value for money services
- Quality services

With the wide range of services provided by the Council, customers will not necessarily always want to use the same access channels to contact us. The

channel used will often vary depending on the type of enquiry, with some things reported on-line without the need to speak to us, and others will be more complex and need a conversation. One of the aims of the strategy is to provide customers with choice when they contact the Council, and that choice is simply Increasing customer expectations of being able to access services online 24/7 present a great opportunity to deliver services effectively, however we must ensure that we continue to meet the needs of those people who do not yet have access to the internet, or prefer to have a conversation with us. Recognising that not all customers will be able to self-serve, there will be opportunities for assisted access to self-service channels and where these options are not possible, or not appropriate, services will be available to customers through our customer service centres In developing the ways in which customers access our services we will use customer insight to inform our understanding of customer needs and contact preferences, and we will recognise that these preferences may change dependant on the type of enquiry, interaction or transaction. No matter how customers choose to interact with us the service provided will be consistent and in line with our published corporate customer service standards. Our staff will be available, and equipped with the skills and knowledge they need, to be able to deliver an effective customer focused service where we get things right first time. To deliver the strategy there are a set of guiding principles around the way we provide access to the services and information from the Council.

## Principles

- **First principle** To make sure the customer remains at the heart of our business
- **Second principle** Ensure a consistent and positive customer experience, getting it right first time, irrespective of the choice of contact channel
- **Third Principle** Develop customer insight to understand what our customers want including monitoring customer usage, preferences, satisfaction levels and the cost to serve, then using that information to improve service delivery and concentrate resources to the greatest need
- **Fourth Principle** Reduce the need for customers to contact us by eliminating unnecessary contact, and when customers do need to speak to us, actively

encourage use of the most appropriate channel whilst continuing to maintain choice for all services.

- **Fifth Principle** Manage demand – design our processes and customer journeys to manage the need, and therefore the demand, for our services to support the second principle
- **Sixth Principle** Partnership working – we will look to avoid duplication of effort by working with partners to deliver services more effectively across the district

## **Our Customer Service standards**

When you contact us, by whatever method, we will:

- Provide a professional, friendly service
- Treat you as an individual, fairly and respectfully
- greet you promptly, listen and deal efficiently with your enquiries
- tell you how we can help you, how long it will take and how we will keep you informed
- try to get things right first time, and put them right if they go wrong
- respect your privacy
- listen to your ideas, and use your feedback to improve our services
- We will use plain English, avoiding the use of jargon, and explain any complex or technical terms. When you contact us On-line or by email
- We will acknowledge that we have received your on-line enquiry or any email messages sent to published departmental addresses, and we will aim to reply fully within 2 working days.



- If we are experiencing high workloads, or your enquiry requires more detailed research before it can be fully answered, we will give an indication of when you can expect to hear from us and will include a contact telephone number to use if your enquiry is urgent.
- Emails sent to individual officers will be replied to within 2 working days, or if the officer is unavailable an out of office message will advise when they will be available and provide an alternative contact to use if your enquiry is urgent.
- When you contact us through social media like Twitter or Facebook, our responses to post, comments and direct messages will depend on the individual service. Even if we do not reply, we are listening and will act on or pass on your comments as appropriate. In most cases, it will be better to contact us directly through this link  
When you telephone us Calls to published numbers
- We aim to answer calls to our published numbers within 45 seconds. At busy times your call may be placed in a queue. If the waiting time exceeds 45 seconds we will offer a free call-back so that you don't have to wait in the queue. We will give a name if asked, and if we need to transfer the call we will tell you who we are transferring you to and check that they are available before putting the call through. Calls to individuals
- We aim to answer calls to individual officer extensions within 20 seconds. If the line is engaged, or the officer not available, you will be able to leave a voicemail message. We will check our messages daily and messages will be updated regularly advising you when we will be available. We will respond to your voicemail messages before close of business on the next working day, or if we are out of the office, within 24 hours of our return. People when you need to speak to us, technology when you don't Reception facilities
- Reception areas will be well sign posted, clean, tidy and comfortable Private interview facilities are available on request. Reception staff will have specialist training; they will be welcoming and approachable and will deal with our visitors' enquiries as soon as possible. Visits to customer's home or property

- We will make an appointment and let you know if we are delayed. We will clearly explain our reasons for visiting and on arrival we will show an identification card. Wherever possible, we will let you know what follow-up action you can expect. When you write to us
- We will respond to you within 10 working days, if we are experiencing high workloads, or your enquiry requires more detailed research before it can be fully answered, we will give an indication of when you can expect to hear from us and will include a contact telephone number to use if your enquiry is urgent. What we ask of you - To help us deliver the best service we can, we ask that all customers:
  - Are courteous and respectful towards us
  - Provide any information we need as soon as possible
  - Let us know if you need a service to be provided in a different way to meet your individual needs Help us to improve our service
  - We welcome your comments on the service we provide. We will use them to help us to improve our service.
  - If you would like to make a suggestion of improvement, you can complete our online form
  - If you think something has gone wrong, we need to know so that we can put it right. There is a formal Complaints procedure that is easy to use.

## Appendix 2

### Customer service in the public sector

- [The importance of customer service in the public sector](#)
- [Local Digital Declaration](#)
- [Putting customers at the heart of your services](#)

### Allerdale Borough Council Customer related policies and information

[Internal telephone standard](#)

[Paypoint locations across Allerdale](#)

[Customer Service Standards](#)

[Allerdale Complaints policy](#)

### The voice of the customer

[Customer preferences survey July / August 2022](#)

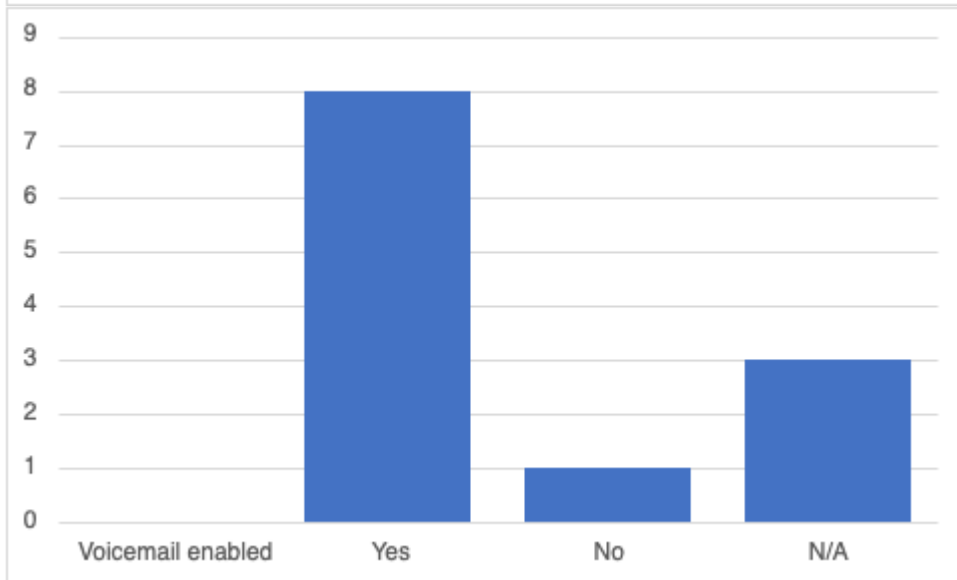
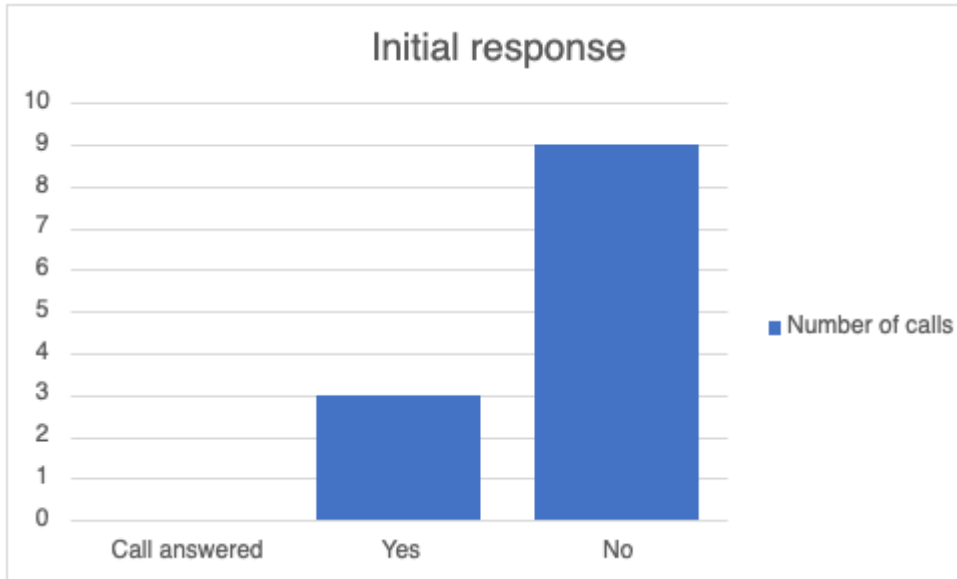
[Customer Satisfaction survey](#)

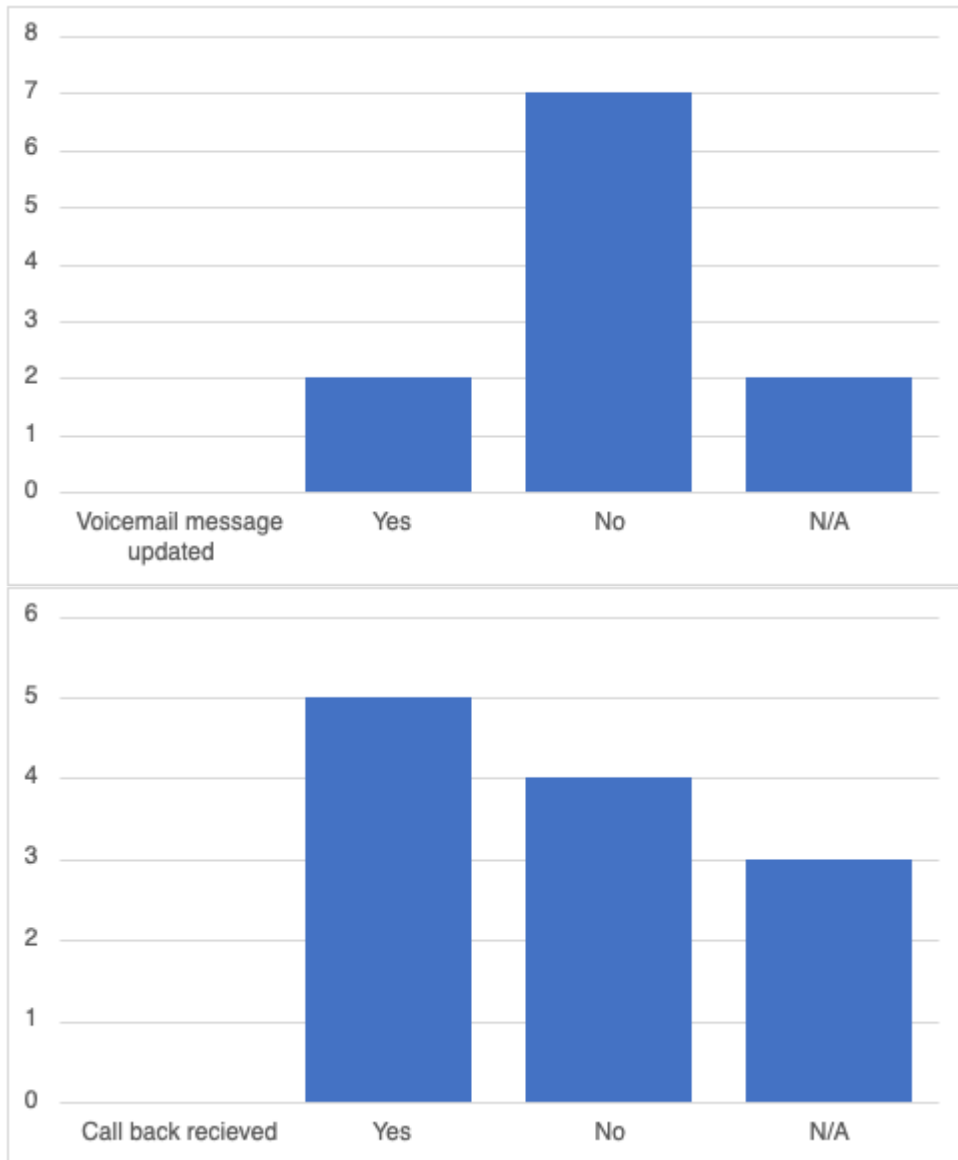
### Mystery Shopping Round 1 result (high level)

#### August 2022

Following an increase in customer complaints and anecdotal evidence detailing the difficulties Customer Service and Business Administration colleagues faced when trying to contact Planning Officers a mystery shopping exercise was commissioned to ascertain the correct use of corporate voicemail, outlook calendars and successful call-backs when requested for customers.

Several scenarios requiring updates from Planning Officers were developed and calls placed to those officers over a six-day period.





### Outlook calendars

Information on Outlook calendars not consistently applied, six were accurate, one unpopulated and four were missing information

Full details of mystery shopping is contained in the table, however officer names have been removed for this document but have been shared with the Chief Officer Governance and Planning Manager to enable training to take place.