

Scrutiny Update Customer Contact Improvement Project

Background

An independent review of customer contact across Newport City Council (excluding Social Services) was undertaken by an external service provider, Basis Ltd. The purpose of the review was to examine the customer contact journey following issues raised regarding inconsistencies around customer contact across the Council.

This report provides a summary of the work completed by Basis Ltd and their findings / recommendations to the Council. The report then provides an overview of the action which has been undertaken by the Council to date and future work which it will be undertaking over the next 18 months to improve the current position. The Scrutiny Committee is asked to focus their attention to this and provide comments and suggestions on the robustness and process to implement improvement across the Council.

REVIEW COMPLETED, FINDINGS AND RECOMMENDATIONS

The Scrutiny committee are asked to review and note the summary of their work and findings in this report, as context for the key issue of what we are now doing to improve our approach to customer services, shown in the next section.

Review

Basis Ltd started their review towards the end of 2023 and concluded in April 2024.

Basis reviewed the 6 customer access points:

- Website
- Social Media
- Elected Members
- Face to Face
- Telephone
- Email contact

The review was based on these areas across all services and departments as well as the customer services team who run the central contact centre and face to face provision.

Basis Ltd observed Customer Services both 'Face to Face' and over the telephone by listening in to customer calls. Interviews were held with frontline staff, senior officers, members and the public/customers. Basis Ltd carried out one service area workshops with the Council's

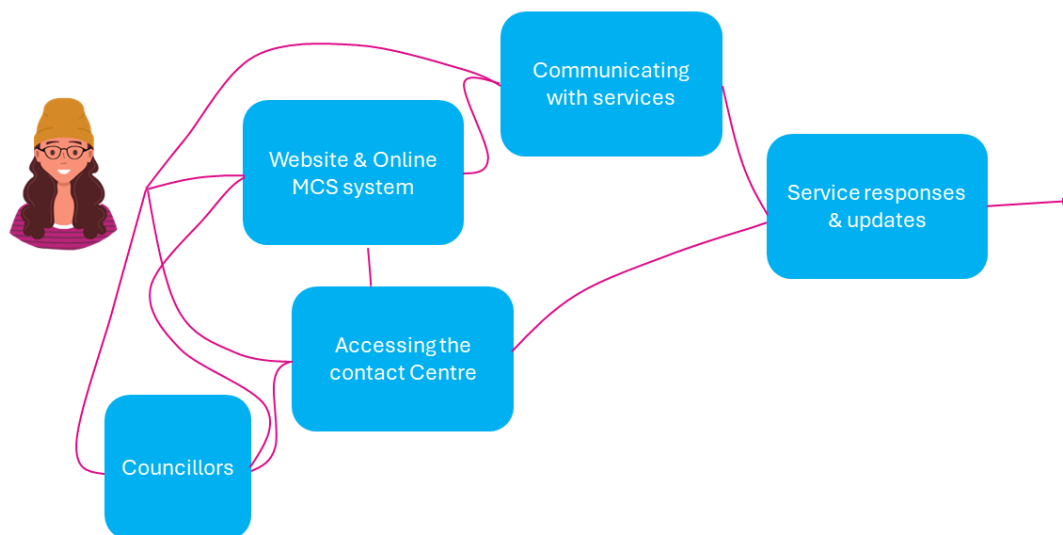
Education Department and introduced some immediate changes to improve customer contact. For example, they identified a delay with customer contact with school admissions and removed the need for customers to email into a specific inbox by introducing online forms, clearer guidance and wording on our website. Work was also carried out with the Intelligence hub to increase data matching and remove the need for evidence submission.

Basis reviewed generic email accounts, My Council Services (MCS) and back-office communications noting there were inconsistencies in responding to customers.

Throughout the review, the focus was on the 'customer experience and requirements' and as noted above, included listening in and taking part in actual customer interactions as well as specific interviews with customers to get their view on the quality of their experience and gain insights.

Findings - summary

Basis Ltd mapped the multiple ways in which customers access help. Each element was then explored with strengths and weaknesses summarised.



The review looked at the number of customer contacts / requests that came through the different channels in the period May – Oct 2023, which totalled 247,706.

In summary, they concluded:

MCS / Website / On-line self-service and forms - this represented the second largest channel for requests at 30%.

“The MCS forms / self -serve has potential to be very effective though more work is needed to maximise the benefits.

A website project is underway and is redesigning it to be more user-friendly. An updated website offers great potential to reduce calls and emails.

Contact centre – Phone calls make up 41% demand entering Council (the largest section of demand)

“Newport’s contact centre is operating reasonably well, in the context of resource limits and a number of specific challenges around demand increasing in complexity and not being empowered to make decisions about the overall customer service system. Often, the amount of demands entering the system is influenced by failure demand created by delays or lack of updates later in the process.”

Services – generic service area email accounts are the third largest route for demand at 23% - which is five times the email volume received by customer services

“Due to capacity issues, services are unable, in some areas, to contact with residents and customer services. It is not easy to get to speak with services or individuals.”

Councillors – *“Demands on Councillors are increasing but the current process is confusing and there are too many ways to raise queries which increases workload. Members are creating their own systems to track their requests. All this adds extra work and stress to all involved.”*

Their review summarised the current position as follows in terms of customer channels and where issues were resolved

| Channel | Level of demand | % of demand received resolved by contact centre | % sent to services |
|-------------------------------------|--|---|--------------------|
| Online MCS (self-service) | 74,191 form completions in 6 months (May - Oct 2023) ¹ 30% of demand entering council | 0% | 100% |
| Phone | 101,579 calls received in 6 months (May - Oct 2023) 66,621 calls answered in 6 months (May - Oct 2023) 41% demand entering Council | 45% ² | 55% |
| Contact Centre email | 11,026 emails in 6 months (May - Oct 2023) 4% of demand entering Council | 48% ³ | 52% |
| Direct to service - “generic” email | 57,006 emails in 6 months ⁴ 23% of demand entering Council | Data not available | Data not available |
| Face-to-face | 3904 face-to-face approaches in 6 months (May - Oct 2023) 2% of demand entering Council | 67% ⁵ | 33% |

As can be seen, whilst there is a customer services department, many / most issues are received and resolved by service areas. It was clear in the review *“that the depth and breadth of customer services was often misunderstood across the organisation”*.

About 23% of demand goes direct to service areas and a large proportion of those received direct into the customer services teams are also then necessarily passed to service areas for resolution, with little visibility or ability to influence how the customer needs are met thereafter. The project therefore not only recognised this fact but also that the implementation of improvements were required across the Council and not specifically to any one area.

Findings – detailed findings

A detailed list of findings was produced and the key points from these are shown below:

Technical Findings

1. Long wait times on the contact centre phone line: The average wait time in October 2023 was 8 minutes and 8 seconds, with a maximum wait time of 56 minutes and 9 seconds. The call abandonment rate was 44%.
2. Customers waiting on Contact Centre phone lines getting cut off unexpectedly: In October 2023, 334 calls were disconnected, which was 2% of the total calls.
3. Services not integrated with MCS: 26% of relevant services are on MCS, leading to process stops. Further work is required to integrate MCS with services.

Process Findings

1. No agreed Customer contact council strategy or charter: There is no agreed strategy or charter that sets out the Council's approach, standards, and responsibilities in relation to engaging and responding to customer contact.
2. Failure demand and repeat calls: 37% of email inbox demand is failure demand, and 9% of calls are repeat calls.

The review identified that the Council has a number of public email accounts. These were sent test emails as part of the review and only a small proportion were responded to.

- No email correspondence direct to service areas is captured and recorded.
 - Under reporting of customer contact impedes service monitoring and demand
3. Contact Centre Interactive Voice Response (IVR) issues: The IVR sets an expectation of residents being able to speak with a specific professional, which is often unrealistic.
 4. Push for online-only self-serve forms: Attempts to push residents to use online-only self-serve forms take more time and effort than anticipated.
 5. Service information not kept up to date: Service information, roles, and responsibilities in the contact centre A-Z are not kept up to date.
 6. Increased frustration from long wait times: Long wait times on the council tax phone line within the Contact Centre leading to increased frustration from customers.

General Findings

1. Customer service is uneven and confusing: Customer service is often uneven and confusing to access, involving delays and a perceived need to nudge and recontact services.
2. Frustration from unmet expectations: Services have to deal with frustrated residents whose expectations are not met.
3. Increased frustration from disconnected calls: Disconnected calls lead to increased demand of multiple calls and increased frustration from callers

Customer engagement

Basis Ltd consulted with customers using a combination of methods including surveys and telephone interviews. They identified barriers, blockages, and areas where customer expectations were not being met.

Key customer improvement opportunities identified:

1. **Website and Online MCS System:**
 - MCS forms are not always user-friendly, leading to residents calling the contact centre instead.
 - The interactive map for reporting potholes provides inaccurate information.
 - Some online forms are clunky and hard to navigate.
 - Lack of feedback from residents on forms.
2. **Contact Centre:**
 - Delays or lack of updates later in the process create failure demand.
 - Average waiting times are perceived as too long.
 - Service information, roles, and responsibilities are not always kept up to date.
 - Customers' phones getting cut off when calling.
3. **Email Communication:**
 - Delays in reading and actioning emails.
 - Emails are harder to understand, prioritise, and resolve.
4. **Face-to-Face Interaction:**
 - Limited to manning the contact centre reception at Newport Central Library and the Civic Centre.
 - Customers using face-to-face service had more complex needs
5. **Communicating with Services:**

- Some services have with limited contact with residents and customer services due to capacity pressures.
- Inconsistent understanding of what constitutes good customer service.
- Lack of clear expectations pushes residents to contact more times by other routes.

These challenges impact the overall customer experience and creates frustration among residents.

Recommendations

The review raised 9 recommendations for the Council to consider and implement.

| | |
|----|---|
| 1 | Clearly set out expectations from every staff member and team on how they need to engage with our customers by agreeing a council wide framework and approach including service standards that are regularly reviewed |
| 2 | Customer services to lead on improving customer experience and have the authority to make decisions so that timely changes can be made |
| 3 | Increase the skills and expertise in customer services so that they can lead on improving customer experience |
| 4. | Minimise generic email accounts as a method of engaging with customers |
| 5 | Commit to self-service MCS becoming the main two-way communication route between council and customers |
| 6 | Make Service Requests using a registered MyAccount the default choice for customers so that we can communicate with them via MCS more effectively |
| 7 | Clarify the role and scope of each main customer access route such as Customers Services and Prevention and Inclusion services so that all know where to go with queries |
| 8 | Prioritise updates and managing customer expectations across the council so that we can reduce repeat calls |
| 9 | In cases where officers need to speak with residents directly, prioritise accessibility and accountability |

ACTION TO DATE AND PLANNED IMPROVEMENTS

The Scrutiny Committee is asked to review and feedback on the action which have already and are planned for making improvements in the Councils interaction with customers.

Newport City Council Response – Customer Contact Improvement Project

Following the completion of the review, the Customer Contact Improvement Project was commenced to respond to the recommendations raised and to improve the customer experience across the organisation.

The project has three deliverables:

1. Increase and improve customer focus across Newport City Council.
2. Improve public and members perception and increase customer trust when contacting the Council.
3. Provide visibility of customer contact points through improved recording and reporting of customer communications.

Project Objectives

The Project has identified three objectives which it will focus its delivery on:

1. **Customer Contact Charter – development and integration**
 - Develop and adopt a Newport City Council ‘Customer Charter’
 - Include Customer service standards at induction point for new staff
 - Develop training for staff / deliver workshop/standards awareness sessions
 - Introduce monitoring measures providing quarterly CMT/service manager reports for oversight into performance to increase accountability.
2. **Minimise avoidable contact (repeat queries)**
 - Proactive use of Communications team and website (information)
 - Reduce direct emails into generic inboxes and standardise responses (automation)
 - Refer to website (information), more use of MCS (self service requests)
 - Review service area customer contact availability and standards to strengthen two-way communication and ensure customers know what has/is happening on their issues.
 - Increase customer accounts in MCS and moving away from anonymous ‘guest’ requests where applicable
3. **Development of MCS (My Council Services) with back-office functions**
 - Report it process – prioritise updating the customer in MCS
 - Improve and increase, where applicable, integration with legacy systems or replace with MCS if feasible
 - Streamline/simplify processes to reduce complication for customers

Customer Contact Charter

This is a key ‘early deliverable’ and once developed and adopted, will provide a key and transparent objective for all staff at the Council. Many Councils have a similar document and

developing one for the Council allows us to provide a framework of Council wide standards for all service areas to operate within, what customers can expect to receive and allow us to describe to, and train Council staff on expectations.

The Charter cannot be achieved from day one and it will therefore be an aspirational document and framework that the project will seek to ensure that services can meet as soon as possible. Implementation of the recommendations and actions from this project will be a key part in enabling this. Sustaining performance and making this 'the norm' will be a large cultural change and therefore may take time and continuous effort and monitoring.

The Charter will be made available on the Council's website and will be promoted across all of our main channels. The Charter will detail the following:

- Availability
- Responsiveness
- Courtesy
- Accuracy
- Efficiency
- Consistency

The Customer Contact Charter is currently being developed and will be ready for formal adoption by the end of Quarter 4.

Project Resource funding

£320k has recently been approved by Cabinet for Project delivery costs, including limited resource from Basis Ltd to support with project mobilisation and initial implementation.

The Customer Services Manager will provide senior manager oversight and input and there is a Project Manager assigned from the Council's Transformation and Intelligence Team. The Head of Finance will also provide oversight and input.

Customer Services Team Leaders will focus upon analysing the findings from the review, creating and facilitating bespoke workshops to service areas, and planning and identifying process and system improvements.

The additional Operations Support Team members will deliver the identified systems and process improvements and provide ongoing support and training.

Basis Ltd will be brought back for a limited period of time to carry out workshops with one or two service areas such as Housing which is one of the more complicated areas for review and will allow for the project team to shadow, learn and use the methodology to move into other areas of the Council. They will also enable us to demonstrate to other services how successful the process review is and what a difference it can make, to encourage buy-in.

Project Team

A project board is established, and board members will meet on a 6-weekly basis. The Project Board will be led by Strategic Director for Transformation & Corporate, with HoS board members representing each directorate.

Project teams who will consist of a core team as described above. When they work in service areas, they will also then include service experts from each area including Heads of Service and Service Managers.

Basis Ltd will support with developing a checklist for bespoke service area workshops and will lead initially with delivery for some of these meetings as this will allow the project team to understand and replicate their methodology as we move through the project.

Project delivery plan

In broad terms:

As described above, an early deliverable will be a customer contact charter which will set the framework to achieve, setting out standards and expectations.

Thereafter, the project will involve undertaking bespoke service area reviews through the delivery of workshops which will:

- a) incorporate findings and recommendations from the Basis report
- b) identify further issues
- c) impart key messages from the Customer Contact Charter
- d) improve customer access through identifying any changes/improvements to processes and procedures
- e) agree customer contact service area performance measures

These can be seen as individual 'mini- projects' across the different service or function areas where they will be carried out and have their own 'mini project teams', including the relevant HoS and service managers to ensure appropriate comms and involvement.

Timeline and Project phases

- **Phase 1: Preparation and planning.** This phase will involve the development of a Customer Contact Charter, mobilisation of the core project team, establishment of the governance arrangements, engagement with Managers and members, communication to priority service areas, and decision-making processes and a timetable of service areas reviews. **Timeline: July 2024 – October 2024**
- **Phase 2: Execution and transition.** Targeted delivery of Customer Contact Workshops and implementation of changes or recommendations from the report whilst including officer insights. Working systematically through each service area throughout Newport City Council. **Timeline: October 2024 – March 2026**

Governance

The Governance organisation will be as follows:

Corporate Management Team (CMT) will provide an oversight role and will deal with cross-cutting issues and decisions as well as issues as they arise. The Customer Services Manager, supported by the Project Manager will attend CMT on a monthly basis to provide insights and report any risks and issues identified. This will help foster ownership and provide support with unblocking any issues.

Service Area project team will comprise the relevant HoS and their service managers, alongside the core project team who will be working with them in reviewing arrangements in their particular services. These groups will therefore be task and finish groups and will be

established as the core team move from one service to the next. This local team will help ensure expertise, specific knowledge and encourage buy-in.

Project Board led by the Director of Corporate Services and includes the Head of Finance, Customer Services Manager, Head of Infrastructure, Head of Law and Standards, Head of Adult's Social Services.

Appropriate project reporting will be introduced for each service area project team, feeding up to the Project Board and reported to CMT. An overall project summary report will be provided to the Project Board and CMT and also used for Cabinet Member briefings.

It is recommended that Scrutiny receive an update on progress every 6 months.

Next steps and timescale

To progress the project delivery and to provide updates through the Customer Contact Improvement Board and DMT