



**REPORT of  
DIRECTOR OF SERVICE DELIVERY**

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**to  
STRATEGY AND RESOURCES COMMITTEE  
14 JULY 2022**

**CUSTOMER STRATEGY – KEY PRINCIPLES**

**1. PURPOSE OF THE REPORT**

- 1.1 To seek Member endorsement of the key Principles to enable the development of a new Customer Strategy.

**2. RECOMMENDATION**

That Members consider and endorse the proposed Key Principles detailed at 4.1.1 to 4.1.9 below to inform a full Customer Strategy.

**3. BACKGROUND**

**3.1 Previous strategy**

- 3.1.1 In 2016 Members approved a Draft Customer Strategy, which identified eight key principles to inform how we would deliver services to our customer.

- 3.1.2 The approved 2016 Customer Strategy:

“complements the existing ICT strategy, and together they will help us deliver the services our customers expect in a way that they need, and which will enable us to continue to provide quality, cost effective services”.

- 3.1.3 At the core of the 2016 Customer Strategy was a move to a Digital by default approach:

“Our website will need to become the primary focus for our customer contact, with an increased emphasis on this channel of communication across all services”.

- 3.1.4 Our ICT Strategy at the time set out an ambitious investment in technology to help us move more of our customers to digital services, however due to the significant financial investment required there was limited progress in achieving a channel shift of our customers to online services.

**3.2 Whole Council Transformation – 2019**

- 3.2.1 In 2018 the Council embarked a Whole Council Transformation that had Digital by Default at the heart of its approach, with the expectation of delivering a prominent level of channel shift and self-service. The associated business case created a significant upfront investment in technology, which was funded through staffing

reductions and efficiencies created by both the channel shift of customers to self-service, and process redesign.

- 3.2.2 The new technology was delivered during 2019, with an updated website, more self-service forms, new telephone system, a new online customer contact system to record all customer enquiries and contact, and all staff having equipment to enable them to work in an agile way, (laptops and telephones that were linked to the laptop).
- 3.2.3 This meant that when the pandemic required staff to work from home, we were in an excellent position to seamlessly continue to deliver services online. The pandemic also accelerated the shift of customers to using our online services with a 90% increase in use of digital services. With the high levels of channel shift it is important that any future Customer Strategy has a shift of emphasis, from delivering channel shift, to one of maintaining and building on the channel shift that has been achieved, with a greater emphasis on customers who may be digitally excluded.

## **4. SUMMARY OF KEY ISSUES**

### **4.1 Proposed Key Principles for our new Customer Strategy**

- 4.1.1 It is proposed that as the eight principles contained in the original Customer Strategy remain relevant they should therefore continue to form the basis of our new strategy, however there will be a stronger focus on:
- a. the need to ensure that we are supporting our customers who are unable to access digital services;
  - b. greater partnership working to support our customers in the community.
- 4.1.2 This approach will enable us to explore the most effective options for delivering our customer service to our residents and businesses, recognising that our customer service does not need to be co-located with our “back office” functions.
- 4.1.3 Right first-time service delivery:
- Making sure that the information / response we provide to the customer is of a high quality and correct from the outset, reducing the need for the customer to contact us again.
  - Reducing errors by getting it right first time and minimising the financial and resource cost of correcting.
- 4.1.4 Resolution at the first point of contact:
- Having a high quality, easy to navigate website that enables customers to find the information or service they need quickly, with minimal clicks.
  - Having skilled customer service staff who can deal with enquiries without the need to pass the customer to a colleague to resolve their enquiry or issue.
- 4.1.5 Helping our customers to help themselves:
- Encouraging and supporting our customers to self-serve, through the provision of a high quality easy to use website, with up-to-date information.
  - Simple to use e-forms that ensure all the relevant information is captured, reducing the need to go back to the customer for more information.

- Working with our partners, to support Digital inclusion, through face-to-face support, signposting to local support groups, recognising the wider benefits of being able to use digital communication.
- Supporting customers to access a wider range of self-help through our partners such as budgeting advice, health and wellbeing advice, training, and skills.
- Ensuring that customers that cannot use our digital services are supported and have access to telephone and face to face services.

#### 4.1.6 Focussing on end-to-end service delivery:

- Ensuring that when we are designing or reviewing processes, we look at the experience from the customers perspective, making sure that the process is streamlined, easy to use, focusing on the complete process, not just parts of it.

#### 4.1.7 Learning from customer feedback:

- Having a clear and easy to use customer feedback process.
- Capture both positive feedback and complaints.
- Using that data to help inform improvements to our services.

#### 4.1.8 Culture and behaviours:

- Putting excellent customer service at the heart of our values and behaviours.
- Embedding our core values across the organisation.
- Strong and positive Leadership- Leadership Team and Members Lead by example.

#### 4.1.9 Encouraging access to services using the most efficient and cost-effective channels:

- Promoting and encouraging self-service or supported access to online services,
- Providing a telephone service for those that are unable to access online services,
- Ensuring a face-to-face service is available for those customers who need a greater degree of support, and for whom digital or telephone services are not appropriate.

## 5. CONCLUSION

- 5.1 Members are asked to endorse the key customer principles at 4.1.1 to 4.1.9 which will inform the development of a new Customer Strategy. This Strategy will come back to Members for consideration before the end of this year and will be subject to public consultation.
- 5.2 These key principles will enable options for the location for delivering our customer services to be explored, recognising that our customer services do not need to be co-located with our “back office” services.

## 6. IMPLICATIONS

- (i) **Impact on Customers** – The customer strategy will provide a clear approach to delivering quality services that meet our customers needs, providing a wide range of digital services that enable customers to transact with us 24/7, whilst still providing telephone and face to face services for our most vulnerable customers and those that are unable to use or access our digital services
- (ii) **Impact on Equalities** – A full Equality Impact assessment will be undertaken to ensure that all of our customers are able to access the services in a way that meets their needs.
- (iii) **Impact on Risk** – Failure to deliver the Customer Strategy will result in both financial and service delivery risks to the organisation. Being able to channel shift our residents to online, structured data forms and increasing self-service was a key element of the organisational restructure in 2019, and the platform on which the staffing reductions were based. A move away from that approach will have financial and staffing resource implications.
- (iv) **Impact on Resources (financial)** – Failure to deliver the strategy and to sustain the channel shift achieved over the last two years will result in additional costs, primarily the resources required to managed the additional workload created by both Covid (such as increases in benefit applications) and other non-covid changes (such as increases in green waste collections and additional Council Tax properties). The additional staffing capacity would be required not just to deal with customer enquiries, but also the additional resources to manage unstructured customer data. Use of digital forms increases the likelihood of all relevant information being collected first time and reduces failure demand.
- (v) **Impact of Resources (human)** – Additional resources would be required if the current “digital by default” approach is not sustained. Our staff support and encourage customers to use our digital services, and work with our partners to support those that are digitally excluded, helping some of our most vulnerable residents to benefit from the wider benefits of using online services such as social contact.
- (vi) **Impact on the Environment** – The digital by default approach to delivering services strongly supports the Councils Climate Strategy, leading by example to reducing the volume of paper documents needing to be submitted by customers, reducing our printing, reducing the need for customers to travel to the Council Offices and sustaining our paperless office approach.
- (vii) **Impact on Strengthening Communities** – Working with local community groups and partners such as the Maldon and District Community Voluntary Service and Maldon Citizens Advice we will champion Digital Inclusion, helping our residents to the wider benefits of digital services, such as helping to reduce social isolation

Background Papers: None.

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