

To: Cabinet

Date: 11 September 2024

Report/Comments of: Scrutiny Committee

Title: Scrutiny feedback to Cabinet – Customer Journey Framework

SUMMARY OF REPORT CONSIDERED	
Workshop Title:	Customer Journey Framework
Purpose/Description of Workshop:	To review the framework and the underlying principles.
Key Decision:	No
Scrutiny Lead Member:	Cllr M Brown, Scrutiny Committee Chairman
Relevant Portfolio Holder:	Cllr M Glancy, Portfolio Holder for Governance, Environment and Regulatory Services

1. Introduction and Overview

A Scrutiny Committee workshop was held on 27 June 2024 to consider the Customer Journey Framework. During the workshop, Members reviewed the framework and underlying principles.

It was noted that feedback from Scrutiny Members would help shape the proposals ahead of Cabinet consideration.

2. Summary of Feedback/Recommendations for Cabinet Consideration

- Members noted their appreciation for the work and performance of the Customer Services Team.
- A Member questioned how many residents from rural locations call with an issue and what the split was between town and rural communities. Whilst this information was not available on the evening, increasing the council's ability to analyse demand data was noted as an important consideration. It was also noted that the Council has increased its offer to rural communities and is delivering some services from village halls throughout the Borough.

- Members would like greater visibility of the nature of the most frequent enquiries and better use of this information to promote relevant information for customers and target communications. For example, what are the five most common issues. If there is a common issue that could be resolved, could it go on a newsletter / borough bulletin so that residents can more readily self-serve.
- There was some concern raised by members that there is a lack of clarity for what happens when a customer query is passed from the customer services team to other council teams, and this is where frustrations can occur. The need for clarity and to manage expectations was discussed. Officers advised that service level agreements between the customer services team and other council teams form part of the work that flows from the framework.
- Members felt that the Council needs to better publicise its offer to customers, including the support available and face-to-face offer. It was felt that misinformation is sometimes an issue, the Council needs to be as open as possible.
- The suggestion of an AI chat bot was raised. It was confirmed that this option will be explored through the CRM procurement process and that consideration of AI as a tool to enhance customer experience is reflected in the draft framework.
- It was questioned whether there is any face-to-face support within the call centre, for example, the use of face time, as some people would prefer to see a face. Members were informed that there isn't currently such an offer within the call centre but explained that customer services colleagues do refer customers to the Community Support Hub Team at Phoenix House if further support is needed.
- In response to a query about managing service demand, the Customer Service Team Leader explained that the biggest issue the team has is manning the phones to ensure call wait times remain low. The Council uses digital forms for a range of functions and the team manage email and face to face queries from customers too. All tasks require a team member as part of the process.
- Following a query about the size of the customer services team, it was clarified that there are 13 members of staff, but not all are full time, and a rota system is in operation which also gives each staff member time on a variety of tasks. It was noted that the customer services team working environment is highly pressured and members agreed that that opportunity for some variety (rather than always answering phone calls) was important for team morale and wellbeing.
- In response to a query about staff turnover, it was noted that there is relatively high staff turnover in the customer services team but that many staff leaving the team go on to secure internal roles in services

across the council. It was noted that being in the customer services team gives staff valuable experience and insight into the work of the council, and that this often makes them an asset to other service areas.

- Members discussed their role in helping to manage customer expectations and to assist by asking the right questions of officers and establishing facts before making judgement on a situation that may be brought their attention.
- It was suggested that officers from the Senior Leadership Team should create more opportunities to see what is happening within services.

Comments on the proposed customer journey framework and principles (“The Wheel”)

- Members were supportive of the proposed framework and principles. It was noted that the framework and principles are comprehensive.
- One Member commented that the graphic itself is too wordy and suggested it could be revised, or a simpler version also produced. Members agreed there is a need for use of plain English and to avoid jargon customers.
- Some members felt they had not had a positive customer experience when making an out of hours call and sought assurance that the principles applied for out of hours calls. It was explained that the service levels outside of office hours are different (emergencies only), but that the overarching principles remain relevant. Members were advised that the Corporate Strategy includes a commitment to review the out of hours service.
- Members sought assurance that the council has an inclusive approach, and that the framework will ensure the council supports customers with additional needs, and can respond to the changing need of communities, for example assisting residents who may not speak English as a first language.
- In terms of the holding queue (telephone call), Members suggested having messages which inform waiting customers on useful or current topics. It was noted that the Council offers a call back service which may negate the need for such an initiative, and that the current telephone system (“Storm”) is complicated which means that creating such messaging would require considerable time.
- Members suggested that the council explores having an app in the future. Officers noted such capability could be explored when soft market testing for the future CRM system.
- To aid customers and staff to identify locations when things are reported with a location members suggested there should be better use of location pinpointing. Officers informed Members that “What three

words” are used for some services (eg to report flytipping) and could be expanded further.

- I was noted that it was important to record the reason for customers contacting the Council. Members felt that sometimes customers get into difficulty because they don't know how to access a service or where to go for help.
- Members considered that the council could improve the information it holds about customer preferences. It was felt that all services should have access to the right information to make sure responses are appropriate for example, ringing people at a mutually convenient time or communicating in a way that meets the customers' needs.
- Members considered the planned re-procurement of a CRM system and noted that the success of a CRM system is that the system can record why residents are ringing and will require residents to tell their circumstances only once.
- Members noted the risk of a 'sales pitch' from prospective CRM providers and were assured that when procuring a new system, the 'show me test' is important.
- Members felt that there should be an opportunity for customers will be involved in the procurement process or testing of the software from the customer perspective.
- Members enquired whether there is more information that could be made available to them to assist them to manage enquiries from residents in their wards (such as a 'read only' view of certain information), particularly to understand if a matter had already been raised, to avoid multiple channels of communication on the same thing. GDPR constraints were discussed, and officers committed to exploring this further.

Written by: Scrutiny Committee Chairman in consultation with Members of the Scrutiny Committee