
Report To:	Policy & Resources Committee	Date:	19 September 2017
Report By:	Chief Financial Officer	Report No:	FIN/64/17/AP/FMac
Contact Officer:	Fiona Maciver	Contact No:	01475 712904
Subject:	Customer Services Performance – Annual Update		

1.0 PURPOSE

- 1.1 The purpose of this report is to provide the Committee with an update of Customer Service Centre (CSC) performance for 2016/17 and to provide an update on the Action Plan approved by the Committee in 2015.

2.0 SUMMARY

- 2.1 Following the opening of the Customer Service Centre in the summer of 2012 the Policy & Resources Committee approved its first Customer Services Strategy in November 2012. This Strategy was refreshed in September 2015. It was agreed that an annual update on CSC performance would be presented to the Committee.

- 2.2 Appendix 1 contains the updated Action Plan which shows:-

- 7 x Blue (Complete) actions
- 5 x Green (On Track) actions
- 1 x Amber (Delayed) actions

More detail on progress is provided in the report.

- 2.3 Appendices 2 and 3 provide detailed information on 2016/17 v 2015/16 performance in terms of volumes and throughput. Overall the level of performance has been maintained against the new targets that were set last year.
- 2.4 Section 7 of the report identifies targets for 2017/18 which includes new targets that are reported through Inverclyde Performs and also contains information relating to the Quality Monitoring system that went live in July this year. The section also outlines the impact that Welfare Reform is having and will continue to have on the service delivery within the Customer Service Centre.
- 2.5 Section 8 advises of the work in progress developing a customer service survey based on customers who have had contact with the CSC either face to face, by telephone or by email.

3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Committee notes the positive progress made in delivering the CSC action plan and the plans for further improvement/development in 2017/18.
- 3.2 It is recommended that the Committee notes the anticipated impact of Welfare Reform changes, including the new Scottish Social Security Agency, on the workload/service delivery within the Customer Service Centre.

Alan Puckrin
Chief Financial Officer

4.0 BACKGROUND

- 4.1 The Policy & Resources Committee approved its first Customer Services Strategy in November 2012 following the opening of the Customer Service Centre in Clyde Square. This Strategy was refreshed for 2015-2018.
- 4.2 When the CSC first opened in June 2012, Performance Information was basic and unreliable. A temporary Development Officer post was funded from the Modernisation Fund for 2 years and a series of performance reports which provided more robust information on performance in the CSC was developed. This post, which is now permanent, continues to provide valuable support in assisting the Customer Services Supervisor with Quality Monitoring and in the development of a Customer Service customer survey.
- 4.3 It has been agreed that a report on Customer Service performance will be presented to the Policy and Resources Committee on an annual basis after the summer recess. The report also highlights areas of development that have been or are being introduced to ensure continued improvement.

5.0 PERFORMANCE AGAINST THE ACTION PLAN

- 5.1 The approved Action Plan which can be seen at Appendix 1 shows that 7 of the actions are complete, 4 of which were completed in 2016/17 these being:
 - Report performance annually to Committee.
 - Develop and communicate a Performance Management Framework (PMF) - this framework is produced monthly and reported to the Chief Financial Officer and Revenues and Customer Services Manager and is also circulated to the staff in the CSC and discussed at team meetings.
 - Corporate Complaints Review - the Customer Service Supervisor provided significant support to ICT and the Corporate Complaints Officer in order to ensure that relevant employees were able to utilise the LAGAN system including training and mentoring.
 - Local Support Services (Universal Credit) – All CSC staff were given appropriate training. The implementation of Universal Credit in November 2016 went smoothly with customers receiving on the whole excellent advice and appropriate signposting to other agencies as required.
- 5.2 The one amber action, increased customer involvement in service development has slipped due to resource being diverted to another project relating to voice recording but is now back on track for completion by the end of October and is covered in more detail in section 8 of the report.
- 5.3 The 5 green actions are all on track and the actions relating to improving the core CRM systems and channel shift are monitored through the Digital Access Group chaired by the Chief Financial Officer and are also monitored through the Digital Strategy and Action Plan for 2017-2020 which was approved by the Policy and Resources Committee in June 2017.

6.0 2016/17 PERFORMANCE - REVENUES AND BENEFITS/GENERAL ENQUIRES

- 6.1 Appendices 2 and 3 contain a comparison of performance for Revenues & Benefits enquiries for 2016/17 against the same period for 2015/16 for telephony, customers interviewed and incoming emails. The Management Information (MI) illustrates that volumes have reduced with the abandoned call levels remaining at 23%. Whilst this is short of the anticipated target of 20%, it is encouraging that despite the complexity of many calls since the launch of Universal Credit in November 2016 performance has been maintained. It should also be noted that 2016/17 saw significant system down time over the year where the Northgate Benefit system was not available. This caused the team significant delays as customer calls or face to face enquires could not be answered and calls back had to be made to customers when the Revenues & Benefits system was up and running which had an impact on the volumes of calls handled. Officers have addressed this issue and have moved the system onto a windows based server which should greatly reduce the chances of such down time in the future.

- 6.2 It was reported to the Committee in September 2016 that a Quality Monitoring System had been purchased which, as well as giving the opportunity for senior staff to provide feedback to the advisers for development purposes, aimed to reduce the abandoned call level due to more efficient call handling. The system however had a technical problem which significantly delayed implementation. As well as meaning that there were no calls available for the senior CSR's to listen into for Quality Monitoring purposes, the testing procedures that had to be put in place were very time consuming. The Supplier did eventually resolve the issue and calls have been successfully recorded since the beginning of July this year. It is envisaged that when the checking regime has bedded in this will lead to a reduction in Revenues & Benefits abandoned calls.
- 6.3 It is encouraging to see that the average time that customers had to wait for their call to be answered reduced by 44 seconds and the time to see someone for a Revenues & Benefits face to face interview reduced by 37 seconds even though the average interview duration went up by just over a minute.
- 6.4 The effect of UC can be seen in that the total contact for the Revenues & Benefits team has reduced by 12%, this is counter balanced by the fact that, particularly in the early months of UC full service, enquires were complicated as CSR's had to be sure that customers with changes in their circumstances were being given the right advice about whether to claim UC or HB. Email contact has reduced by 6% which is to be expected due to the roll out of UC full service. It is anticipated that this number will fall further in 2017/18 as the Housing Benefit caseload drops.
- 6.5 Appendix 2 also contains a comparison of performance for Other Services for April 2016 to March 2017. This shows that the abandoned call level has dropped from 8% to 7% which is in line with the target set for this year. The number of interviews has further increased this year largely due to Education enquiries. Wait times for general calls have remained the same and wait time for general interviews has reduced by 56 seconds.
- 6.6 Overall contact for general enquires has reduced by 4%, which in part will be due to the introduction of the citizens app which went live in December 2016. Figures show that 425 contacts have been made through the mobile app over the period January 17 – March 17. What the Monitoring Information cannot determine is that if these are customers who would have contacted us anyway by one of the existing channels or whether the app is attracting 'new' customers who may not have otherwise contacted the Council. The next years figures will give a better picture of how customer contact through the CSC is affected by the app. Current figures show a good outcome in terms of channel shift albeit numbers are still relatively small.
- 6.7 The late opening on a Wednesday morning continues to be of benefit for staff training and development. Appendix 4 illustrates some of the training carried out in 2016/17.

7.0 FUTURE PERFORMANCE/OTHER ISSUES

- 7.1 Customer Services targets have been set with two new ones for 2017/18 around compliments and complaints, the targets are now reported through Inverclyde Performs and are:
- To have fewer than 20% abandoned R&B telephone calls
 - To have fewer than 7% abandoned general calls
 - To receive no more than 35 complaints – 38 were received in 2016/17
 - To receive in excess of 63 compliments – 58 were received in 2016/17
- 7.2 Channel Shift continues to be a key priority and the following actions will help facilitate this:
- Work with suppliers to fully enable the ability of customers to book and pay for calendared and transactional services such as bulky uplifts.
 - Enhance the range of services available via Web Self-service, including integration of MyAccount authentication which would allow one secure sign in.
 - Review and revise the range of services available via the Inverclyde Online smartphone 'app'.
 - Work with suppliers to enable Council Tax account administration such as reporting changes in circumstances via the Council web site.

- 7.3 Progress on the above actions is monitored through the Digital Access Group which is chaired by the Chief Financial Officer and is also tracked through the Digital Strategy and Action Plan. These projects are scheduled to be complete by the end of 2017/18 provided the implementation phase and testing go as planned.
- 7.4 As reported in section 6, the Quality Monitoring system is now live and a percentage of calls are listened into by the Senior Customer Service Advisors (SCSR's). A scoring matrix is applied to give an overall score for each advisor. Templates have been developed for each of the key areas such as R&B, taking payments, switchboard enquires and for the key services such as Environmental and Safer Communities. The elements that are scored on will vary depending on the service however the following summarises the key areas that are scored:
- Did the CSR apply the correct greeting and offer further assistance at the end of the call.
 - Did they apply the standard verification protocols.
 - Did they access the correct record.
 - Did they sound friendly, polite and interested in helping.
 - Did they deploy effective listening and effective questioning skills to gather further information avoiding the use of jargon.
 - Was the customer given correct advice, guidance and/or issued the correct forms as appropriate.
 - Were the appropriate systems updated.
 - Were the correct procedures followed when transferring a call.
- 7.5 Various parameters can also be monitored such as handling times of calls over or under certain duration. The SCSR's provide one to one feedback to the CSR's on their performance and ensure that feedback is positive where merited as well as highlighting areas where improvements can be made.
- 7.6 The CSC has continued to enjoy successful outcomes through the placement of Modern Apprentices (MA). Working in the CSC gives young adults a wealth of experience as well as confidence through dealing with different types of customers on the telephone and face to face. There are currently no MA working in the CSC however 3 former MA have found permanent jobs one outwith and two within the Council within the last year which is hugely satisfying for the individuals and for the CSC Senior staff to see the MA develop as a result of the training and mentoring they receive. The Service has just been advised that two new MA will be joining the team late September/early October.
- 7.7 As has been indicated above, Welfare Reform is having an impact on the volume and nature of contacts with the Customer Service Centre. The pace of this change will not reduce over coming years as Universal Credit continues to roll out and the Scottish Government develops its own Scottish Social Security Agency. The requirement for ongoing training and flexibility is therefore as important as ever. Initial discussions will take place with Government officials later this month regarding options locally to deliver the new benefits due to come in from 2019.

8.0 CUSTOMER CONSULTATION

- 8.1 The biannual Citizen's Panel asks questions about customer service and whilst feedback from this is valuable many of the answers will come from customers who have never used the services of the Customer Service Centre. It is important therefore to gain insight of the experience of customers who actually use the Customer Service Centre. This will let the Service improve by identifying where the service falls short of their expectations as well as building on what they feel the service already do well.
- 8.2 After asking what service and by what channel the customer contacted the CSC about, a range of questions will be asked to ascertain how happy or otherwise customers were about waiting times to speak to a member of staff, how knowledgeable, professional and helpful the staff member was, as well as establishing how satisfied or otherwise the customer was with the final outcome and overall service received. The questions will be on a scale of 1 - 5 from agree to disagree and very satisfied to very dissatisfied. Free type space is provided to allow for customers to add

comments as to why they disagreed or felt dissatisfied; this qualitative information is essential if improvements are to be made. At the end of the survey customers will also be asked “What did we do that impressed you most” and “what could we do better next time”.

8.3 The results will be reported back to the Committee.

9.0 IMPLICATIONS

9.1 Finance

Financial Implications: There are no financial implications arising from this report

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

9.2 Legal

There are no legal implications arising from this report.

9.3 Human Resources

There are no direct HR implications arising from this report.

9.4 Equalities

There was a full equalities impact assessment carried out with the initial Strategy and as such an equalities impact assessment is not required at this time.

9.5 Repopulation

The provision of quality Customer Services to existing residents and potential residents plays an important part in the retention and attraction of people to Inverclyde.

10.0 CONSULTATIONS

10.1 None

11.0 LIST OF BACKGROUND PAPERS

11.1 None

Customer Services Action Plan as at 31st July 17

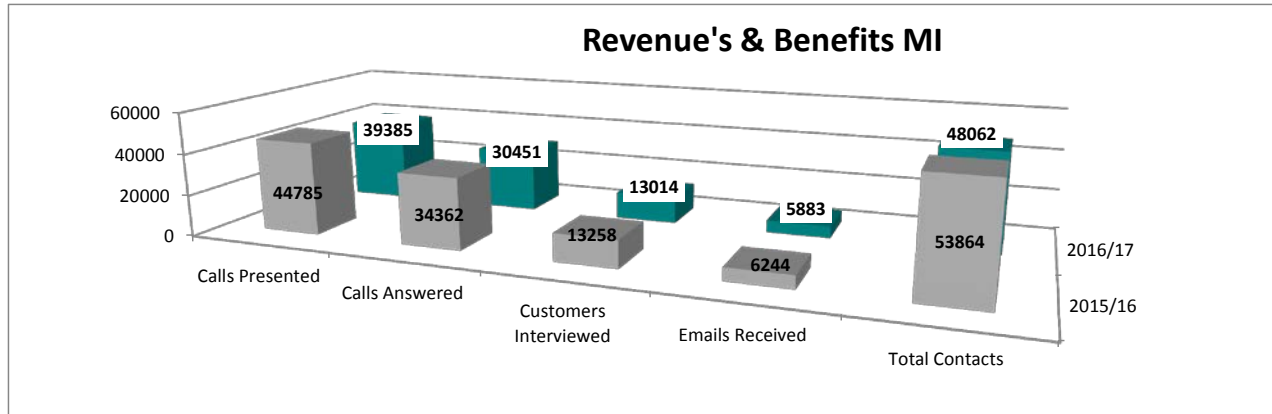
Appendix 1

Action	Action	Success Criteria	Target Date	Responsibility	Current Position	Status
PEOPLE	Training needs will be identified from quality checking and appraisals	Training programme in place Better trained and confident staff. Better customer satisfaction Completion of CSPQ Staff understand expectations allowing resources to be correctly targeted. Service delivery meets management expectations Customer Service visions and outcomes are agreed	On-going	CS Supervisor/CS Support Officer	11 CSC staff have completed or are in the process of completing their CSPQ	Green
PERFORMANCE	Implement quality management templates and frequency of review. Agree escalation process where individuals repeatedly fail to meet required standards.	Reduction in handle times of enquiries Better motivated and confident staff Improved customer service delivery Improvement in scoring of individual's quality managed calls	On-going	Customer Services Supervisor/Support Officer	Templates developed software changes being made.	Green
CUSTOMER ENGAGEMENT	Develop consultation approach and select areas to be consulted upon.	Survey completed and action plan developed incorporating the needs of our customers	Sept '17	CS Support Officer	Slippage due to issues. New target date set of October 2017.	Amber
	Use the website to communicate meaningful information to our citizens	Customer satisfaction improvements - customer expectations are managed better when targets are understood	On-going	Revenues & Customer Service Manager/Corporate Communications	On Going	Green

SERVICE DEVELOPMENT	Develop Kana system , implementation of web self service portal, mobile applications for citizens and staff, mapping integration for location based fault reporting with corporate GIS system.	Reduced workload for customer services. Streamlined process. Migration of Web-Labs eforms to Kana eforms. Quicker service notification of new/updates to cases. Aligns to digital strategy allowing leverage of potential benefits.	2015-18	Revenues & Customer Services Manager & ICT	Citizen mobile app has been live since Dec '16; 9 different types of enquiries can be reported directly via Lagan to the service. The same enquiry types have been updated via the website to replicate the process. GIS has still to be incorporated for use by Customer Service staff	Green
	Develop online mapping and on-line payments.	Increased achievement of efficiencies through a reduction in direct customer traffic to the Council and more resolution through lower cost channels. Wider range of funds available for on-line payments.	2015-18	Digital Access group	11 additional services can now be paid for on line. Others such as citizens mobile and web self service will follow when the Kana self service module is live	Green
	Report to Committee via MBWG by December 2015.	CSC staff well informed to provide the necessary advice to customers	From 2016	Revenues & Customer Services Manager/Principal Officer	Complete	Blue
	Implement late opening. Regular staff meetings to take place.	Staff feel consulted and able to contribute to improvements through team meetings and feedback opportunities.	Oct/Nov '15	Revenues & Customer Service Manager/CS Supervisor	Complete	Blue
	Complete recruitment and creation of new teams.	New team in place. Improved customer performance.	June '15 - Aug '15	CS Supervisor	Complete	Blue
	Review SLA's on an annual basis & conduct quarterly meetings.	Documents signed off by each service and higher levels of internal customer satisfaction.	On Going	Revenues & Customer Service Manager/CS Supervisor	Complete	Blue

	<p>Agree targets reflecting service vision and based on performance information. Agree areas to be reported and frequency. Analyse data/stats/feedback/customer surveys to identify and prioritise improvements.</p>	<p>Staff have clarity/clear objectives. Targets are achieved Performance reports, KPI's Performance meetings/benchmarking Changes implemented and improvements made</p>	<p>From Jan '16</p>	<p>Revenues & Customer Service Manager & CS Supervisor</p>	<p>Complete. Targets agreed in CDIP. Stats circulated monthly</p>	<p>Blue</p>
	<p>Develop configuration of Lagan system to ensure the relevant information is captured for the Corporate complaints process and statistical returns</p>		<p>Aug/Sept 2016</p>	<p>CFO, Revenues & Customer Services Manager & ICT Operations Manager</p>	<p>Monthly meetings held with Corporate Complaints Officer. All CS staff fully trained.</p>	<p>Blue</p>
	<p>Annual Report to be produced and passed to senior management</p>	<p>Improved focus on key tasks and improved performance.</p>	<p>Sept '17</p>	<p>Revenues & Customer Service Manager</p>	<p>On target for September P&R</p>	<p>Blue</p>

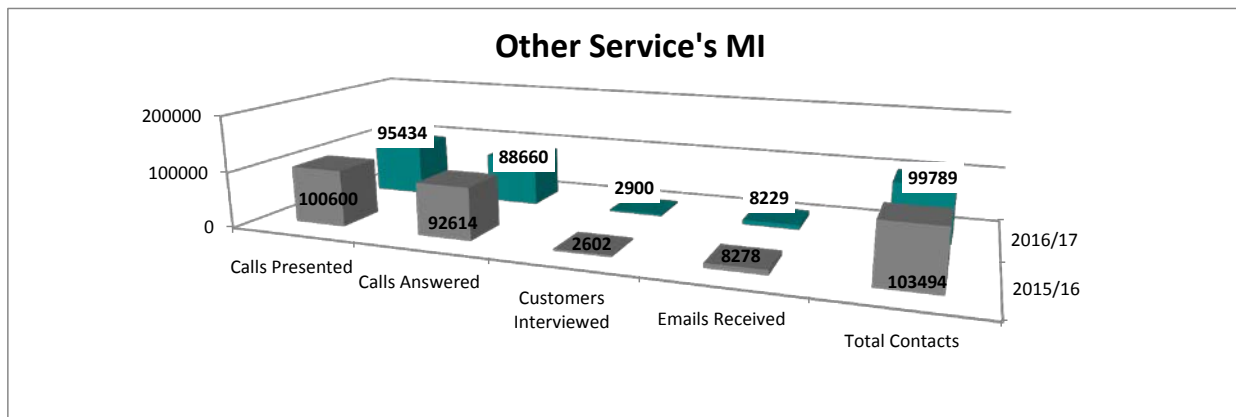
	2015/16	2016/17
Calls Presented	44785	39385
Calls Answered	34362	30451
Customers Interviewed	13258	13014
Emails Received	6244	5883
Total Contacts	53864	48062



What does the MI show (annual)?

- * Calls presented and answered has decreased by 14%
- * Calls handled has remained at 77%
- * Customers interviewed has remained roughly the same.
- * Abandoned call level remains at 23%
- * Emails received has decreased by 6%
- * Total contacts has decreased by 12%
- * The introduction of Universal Credits Full Service has resulted in a reduced customer contact for Housing Benefits.

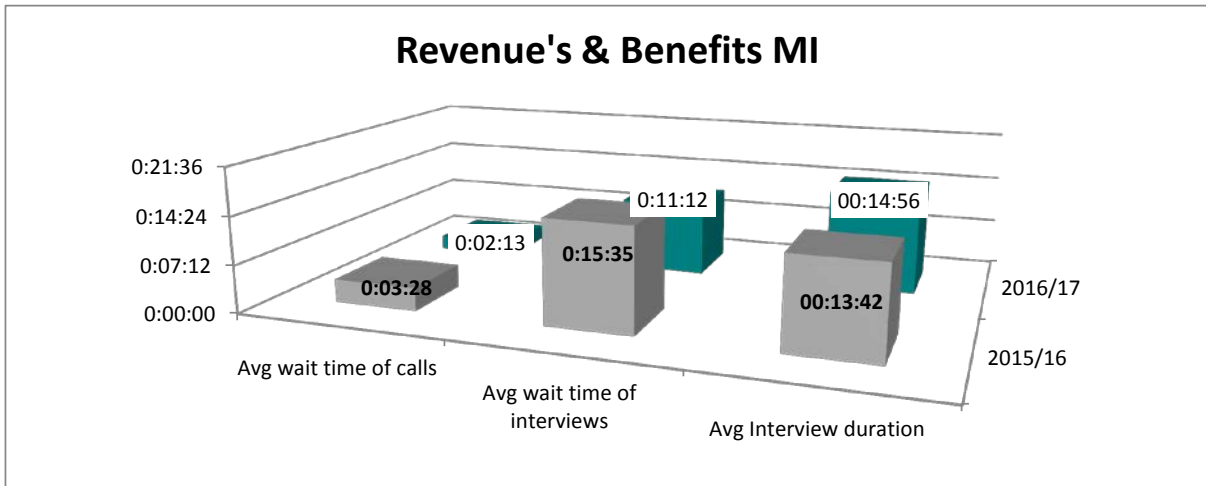
	2015/16	2016/17
Calls Presented	100600	95434
Calls Answered	92614	88660
Customers Interviewed	2602	2900
Emails Received	8278	8229
Total Contacts	103494	99789



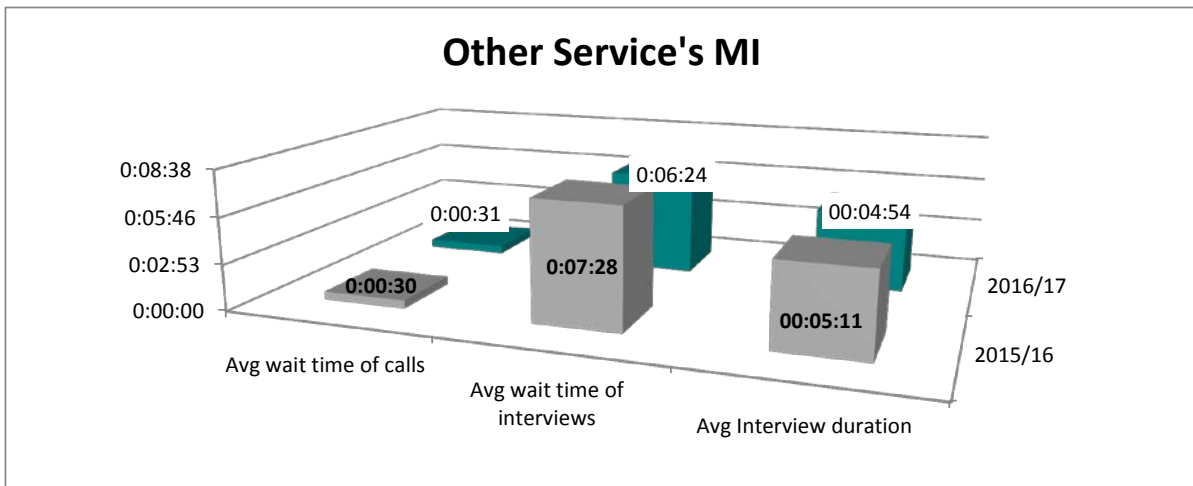
What does the MI show?

- * Calls presented for all other non R&B services has decreased by 5%
- * Calls handled for all other non R&B services has decreased by 4%
- * 7% of calls remain unanswered compared to 8% last year
- * Interviews have increased by 10%
- * Emails has remained at the same volume as last year.
- * Total contacts has decreased by 4%. However, 425 contacts from customers have been made through the mobile app and the web over the period Jan '17 - Mar '17. These enquiries were originally taken by customer services but with the introduction of these channels these cases are now passed through directly to the service.

	Avg wait time of calls	Avg wait time of interviews	Avg Interview duration
2015/16	0:03:28	0:15:35	00:13:42
2016/17	0:02:13	0:11:12	00:14:56



	Avg wait time of calls	Avg wait time of interviews	Avg Interview duration
2015/16	0:00:30	0:07:28	00:05:11
2016/17	0:00:31	0:06:24	00:04:54



Customer Service Training

E-Learning

- Information Governance (refresher as 2 years since last completed)
- Information Security (refresher as 2 years since last completed)
- Records Management (refresher as 2 years since last completed)

Delivered by 3rd party or Service

- Conflict Management
- Council Tax – discount and exemption training
- Parking Restrictions overview
- Data Protection overview
- Advice First overview
- Trading Standards overview
- Discretionary Housing Payment overview
- Temporary Absence outside the UK – Housing Benefit related
- Licencing overview
- Nil By Mouth – Sectarianism Training
- Universal Credit refresher
- Language Line Interpreting Service
- Adult Literacy training
- Corporate Complaint training

Service Specific training – delivered by senior staff/CSSO/CSS

- Education refresher training
- Environmental refresher training
- Clarification of duties overview
- Cash Reconciliation training
- System navigation training to log complaints
- My Universe overview – call evaluations (quality management system)
- Lagan navigation for new script process
- Veterans refresher training
- Housing Benefit changes – universal credit impact

Team meetings, time for **C**ustomer **S**ervices **P**rofessional **Q**ualification (CSPQ) coursework, time to catch up on email correspondence and scanning and indexing have also taken place during this time.