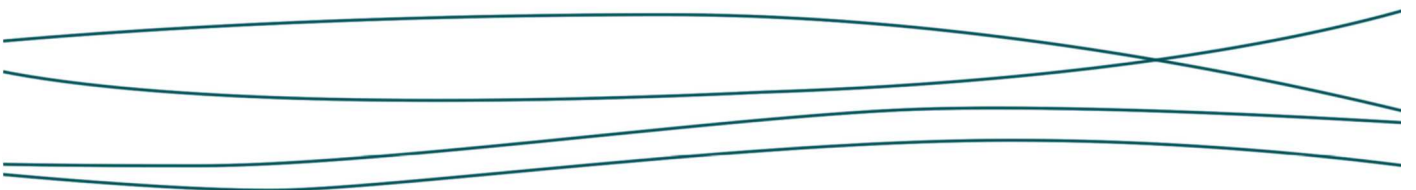


Customer Management Strategy

October 2012



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This document is divided into four parts: Executive Summary; Context; Customer Management Strategy; and Access Channels. These can be read as separate documents but, together, describe Cardiff's customer management approach.

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Part 1 – Executive Summary

This part gives a short overview of our approach.

1 Executive summary

Cardiff Council recognises the need for a clear and coherent definition of the way forward for Customer Management in Cardiff. Specifically, this document articulates:

- The vision for the way customers are managed across all services;
- The strategy which will deliver this vision;
- The approach and general guidelines for the development of customer access channels.

1.1 Background

Customer management provision in local government has traditionally been designed around organisational rather than customer needs and has often been based on organisational silos. From a customer viewpoint this is confusing, with inconsistency in the way services are delivered and information is provided to customers. We want to place the customer at the heart of the organisation – this philosophy underpins the Customer Management Strategy set out in Part 3 of this document. We want fundamentally to transform the experience of customers when they contact the Council by re-orientating our services around their needs.

1.2 Customer needs

The Council's customers include a very wide range of social, cultural and ethnographic groups, many of which may have specific needs that the Council is obliged to meet. Since Connect to Cardiff (C2C) was established some 10 years ago there has been a revolution in the way that the general public has accessed retail services from the private sector, and on-line shopping, banking and insurance transactions are now fully accepted and used by a large proportion of the population. In addition, social media and mobile technologies such as smartphones, which were not available 10 years ago, are now heavily used, particularly by younger segments of the population.

Whilst the standard of customer management varies widely from one organisation to another, there is a growing expectation among the general public of certain standards, for example for an organisation to do what it says it is going to do, when it says it is going to do it. This expectation applies equally to public sector services, as growing criticism in the media of poor customer service from central government bodies such as HMRC demonstrates.

Unlike private sector organisations, local authorities have a duty to cater for all segments of their populations, many of which generate specific needs. For example:

- Minority ethnic groups may have specific language and cultural needs;
- Elderly and/or deprived people may not have the skills or facilities to access services via the Council's preferred access channels, e.g. web;
- Different customer segments may have needs for 'bundled' services, e.g. Housing, Housing Benefits, Social Care.

The Council's approach to customer management needs to address these obligations.

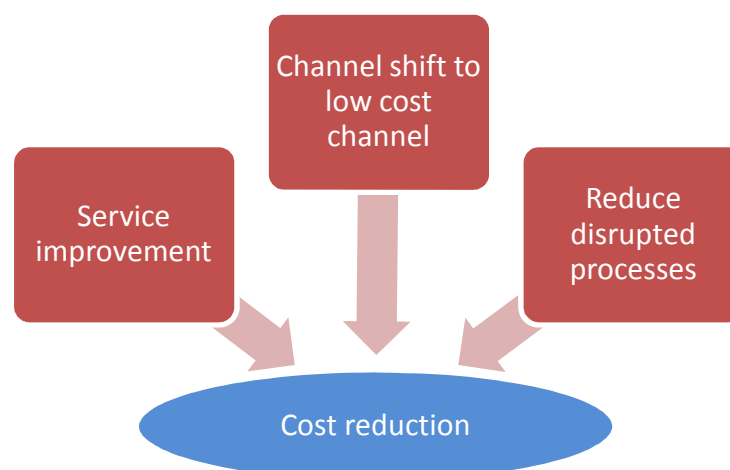
Customer surveys show that Cardiff's customers have a generally positive view of the Council's services, although there are many examples where there is clear room for improvement, particularly in the fulfilment of customer service requests by service areas.

The table below summarises some of these issues.

Issue	Description
Disjointed services	Customers are unable to obtain an answer from service area phone numbers. Customer calls are frequently passed from section to section.
Office hours only	Service areas typically provide a service only during core office hours, which may not be convenient for many citizens.
Little feedback on progress	Little feedback is given by service areas on the progress of service requests, and quoted service standards frequently fail to measure end-to-end performance.
No single view of customers	C2C agents and service area officers are unable to see transaction histories or other service needs, to tailor interactions with individual customers. Data has to be gathered repeatedly, leading to customer dissatisfaction and duplicated effort by Council staff.
First contact resolution	Limited range of transactions currently within the scope of C2C. Frequently, requests have to be handed to different service areas.

1.3 Organisational needs

Whilst there is a clear need to maintain and in places improve customer management standards, a primary driver for the Council is to reduce cost. The approach to this is demonstrated below, highlighting the link between improved customer management and savings.



At present, substantial volumes of customer contact are executed through high-cost access channels, in particular post/mail. In addition, the division of responsibility for customer management between C2C and individual service areas, with some initial customer contacts being routed via C2C and some routed directly to staff in service areas, results in unnecessary handovers and process steps, thereby increasing cost as well as generating inconsistencies in the customer experience.

Handling of initial customer contact by service areas also frequently results in disruption to the work of technical officers to address minor issues that could be dealt with by less qualified (and therefore less costly) staff. Where service areas do have dedicated customer-facing staff, the teams are often too small to provide cover

effectively for sickness and holiday absence, or conversely are too large to be fully utilised at normal levels of customer demand.

The move towards lower cost and lower intervention channels for routine service access will allow staff to be focused on dealing with those customers who need more intense interventions. This should improve outcomes for more vulnerable citizens and lead to further cost savings as there is potential for avoidable contacts (failure demand caused by errors and misunderstandings) to be reduced.

At present, there is little rigorous analysis outside C2C of contact volumes, handling times, service performance and the root causes of customer contact. There is a need for a more rigorous approach to the management of customer contact, and the promotion of service improvement, informed by the collection and analysis of relevant data.

1.4 Our Customer Management Vision

In order to shape customer management across the organisation the following vision has been developed which will fundamentally transform the customer experience and support cost reduction:

We will put our customers at the heart of what we do. We will give everyone easy access to services using the methods they prefer, at times that suit them, be it through a personalised customer online account, face to face at a local Hub, over the phone to a member of staff or in any other way we can reasonably provide. We will use technology where it enhances our service delivery and provides better value for money. Creating simpler and more efficient services reduces the cost of delivery services and forms the basis of our Strategy.

The real test of this approach will be whether we achieve improved customer experience, as reflected in significantly raised levels of customer satisfaction, at lower cost. The vision is supported by a number of customer service principles which are clear and easy to understand.

1.5 Our Customer Management Strategy

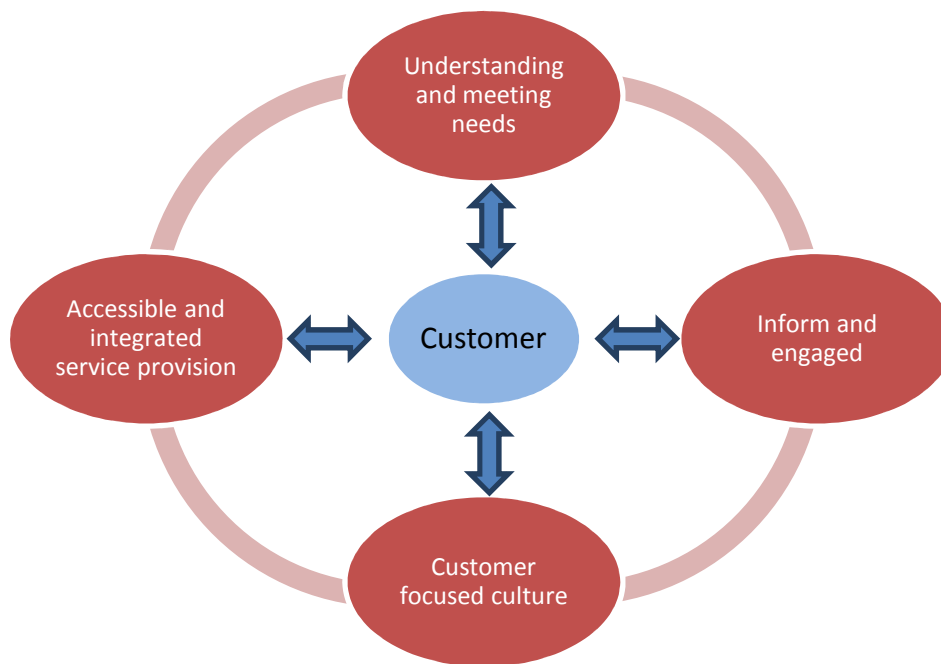
Our strategy to achieve this vision is focused around four key themes, with associated priorities as shown below.

Understanding and meeting needs: Development of a clear understanding of customer needs, both now and in the future, and of their experiences in interacting with the Council. These will be used to further improve customer focus.

Informed and engaged customers: Effective two-way communication with customers so that they know what to expect and feel well informed.

Customer focused culture: Ensuring that all Council staff have the right skills, support and motivation to create a customer focused culture across the whole organisation.

Accessible and integrated service provision: Development of an appropriate range of access channels, including web, mobile apps, phone and face-to-face (via Citizen Hubs primarily), which meet both the needs of all customer segments and the Council and are fully incorporated into the design of the services themselves.



The application of these themes across the whole Council will deliver a significant change in the attitudes of many staff, ensuring that the delivery of high quality services *for customers* is seen as the purpose of our work.

This change will take a number of years to effect, but universal adoption of the concepts in this document across all service areas will not only result in substantial improvements in the public's perception of the Council but will also deliver efficiencies through increased 'right first time' delivery, shorter business processes and reduced failure demand.

1.6 Access Channels

In order to exploit the potential of our investments in web and other emerging technologies, and whilst respecting the needs of individual customer groups, we will develop new access channels and encourage a general shift in channel usage from higher cost to lower cost channels. This will involve:

- Designing access channels with the needs and preferences of our customers in mind, ensuring that we enable those who require it to use face to face services;
- Encouraging greater use of the most cost-effective contact methods;
- Creating a positive experience for our customers through their use of these new access channels and types of interaction;
- Actively encouraging service areas to work together with each other and with Customer Management;
- Learning and innovating continuously;
- Identifying savings by analysing customer experiences and end to end cost to serve data.

Implementation of these measures will support the organisation's objective of reducing costs and will also support improvements in customer service by enabling access to Council services for the majority of citizens on a 24/7 basis.

Part 2 – Context

This part sets the scene of our customers' needs and expectations, how we are currently responding to them, and what this means for our Customer Management Strategy

2 Context

2.1 The needs of our customers

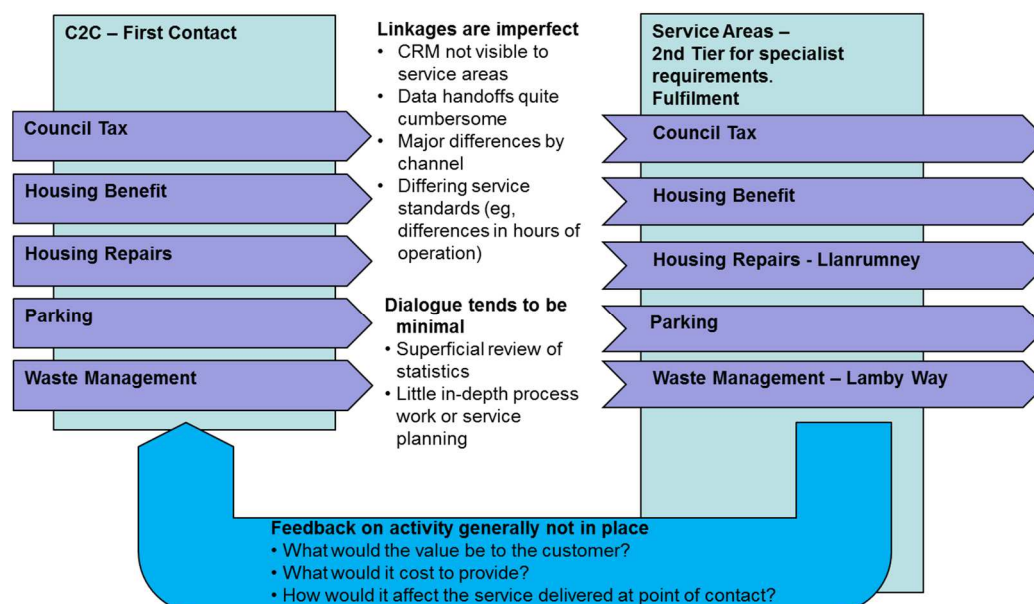
External research into customer needs in the general economy consistently comes up with the following requirements, which are reflected in the practices of organisations with the best reputations for customer management:

- To have promises fulfilled, i.e. for the organisation to do what it says it is going to do, when it says it is going to do it;
- To be kept informed, and in particular to be advised in advance if there is a risk that promises will not be met;
- To be known by the organisation and not to have to provide information more than once;
- To be dealt with promptly and courteously in language that customers can understand;
- To have a consistent experience through different channels, when dealing with different services, and at different points in time;
- For staff to be knowledgeable and capable of dealing with their query;
- To be able to access the organisation at times and in ways that are convenient to customers;
- To know what the organisation expects of the customer;
- To understand what the organisation can and cannot do for the customer, and if it cannot do what they ask, to have that explained;
- Not to be handed over from one part of the organisation to another unless absolutely necessary;
- To be treated fairly by the organisation;

2.2 Current State

2.2.1 Our customers – what they find at present

The diagram below illustrates the current state in relation to the customer access experience. Most high volume areas are first handled by C2C with agents then passing callers to the service area for customer requirements to be fulfilled.



Whilst a centralised customer management function is well established via C2C, responsibility for customer management currently remains distributed across all Council departments, as final resolution of contacts frequently rests with service areas (and, in some cases, the initial contact handling as well). The implications of this on the customer experience and the Council's efficiency include:

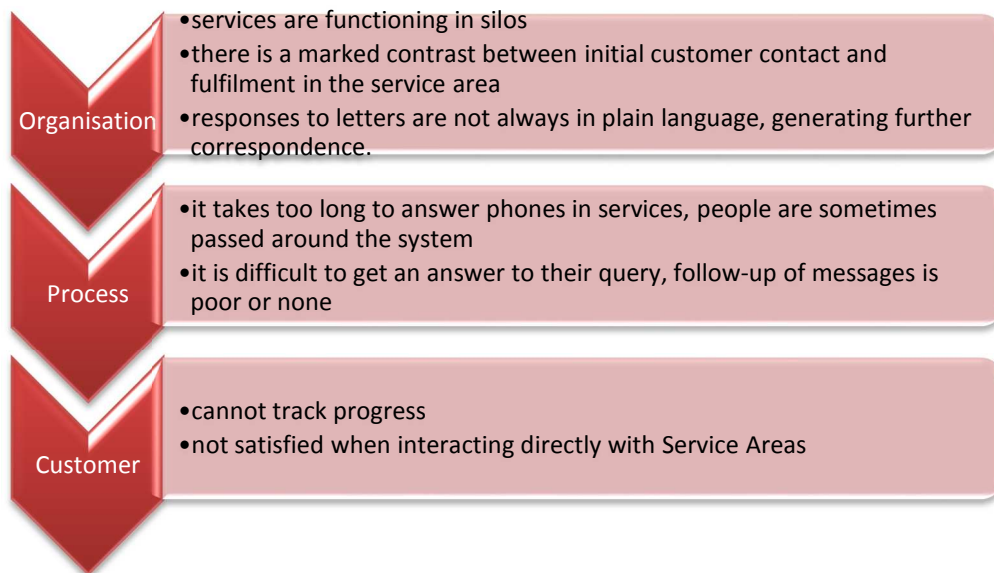
- The customer experience may be disrupted by their being handed over to service areas, and their experiences may be significantly different based on whether they contact by telephone or email;
- Time and effort is wasted internally in executing the data transfer from C2C to service areas;
- Different customer management standards and service performance are delivered by different service areas;
- Service areas may undertake campaigns (e.g. mailshots) which generate substantial inbound contacts without informing C2C in advance, resulting in insufficient resources being mobilised to deal with the demand;
- There is little or no analysis of the causes of customer contact, and consequently no considered view on what can be done to reduce errors and avoid repeat contacts.

In addition, call observations indicated a much higher potential for avoiding calls through:

- Council correspondence being clearer and right first time;
- The website providing relevant, easy to find information in a consistent and reliable way;
- Improving the proportion of requests resolved at first contact;
- Relevant service messages being available through IVR (Interactive Voice Response – automated messages that customers can hear);
- Automated services promoting all payment types;
- Automated bookings being available for all relevant facilities;
- Accurate time for action/ resolution being given;
- Appointments being kept;
- Progress updates being made available on the web.

The Council receives feedback from customers via a number of channels but this is not collected and analysed in a consistent way.

The diagram below illustrates key messages identified through consultation.



2.2.2 Current access channels

The current access channels are summarised below.

Telephone. This is the main channel for customer access to the Council, however, while there are publicised central contact numbers such as C2C, there are also a large number of other telephone numbers publicised or made available to the public.

Face-to-face. This is available across a number of different Council sites including Marland House and libraries. This service has been expanded recently through the implementation of pilot Citizen Hubs.

Website. The Council's website provides a reasonably comprehensive service, but in some cases information is out-of-date and difficult to search. The on-line transactions available include a range of service request forms, but these use 'Mandoforms' which are not integrated with back office systems. These, therefore, merely capture the customer request and pass it on to the relevant service area who have to re-type the details into their own relevant system.

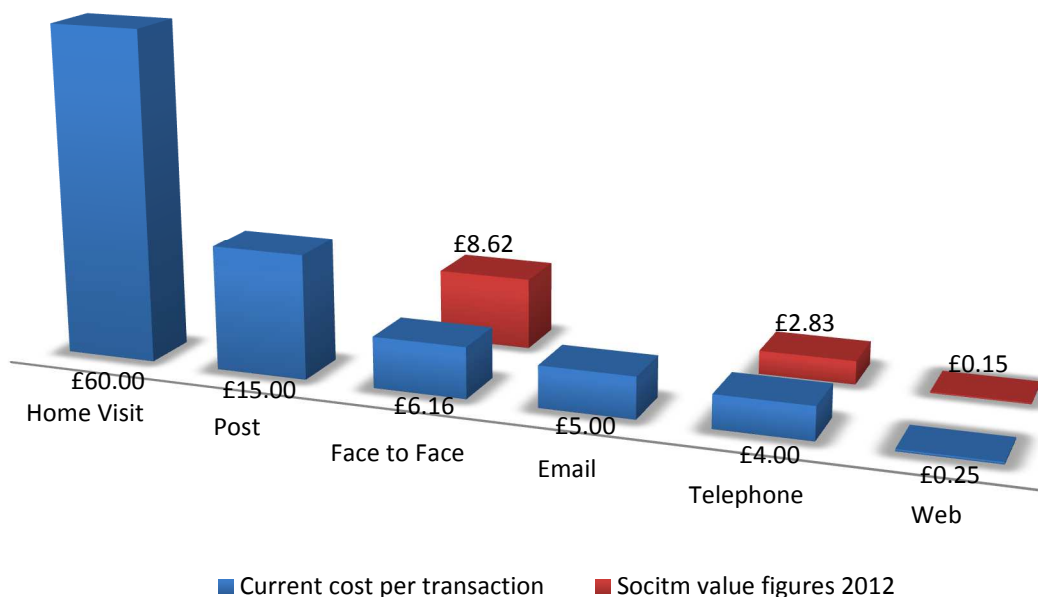
White mail (post). This is a popular mode of communication with the Council (and is often the only feasible channel, e.g. when submitting applications), accounting for an estimated 20% of customer contacts.

Email. Email is a major, unmanaged, channel – significant numbers of contacts are received and they are treated in the same way as white mail since there is no automated handling system for emails.

2.3 The Council's position

In common with the whole of the UK public sector, Cardiff Council is under substantial financial pressures and has significant real-terms savings targets to meet. Politically, cuts in support services may be viewed as more acceptable than cuts in 'front line' services and Customer Management is more likely to be viewed as a support or administrative service rather than a front line service such as Social Care or Education. The Council therefore needs to strike an effective balance between the costs of dealing with customer enquiries and requests and the cost of delivering the services that have been requested. The aim of the whole Council should be to

reduce the costs of entire end-to-end processes that deliver services to customers, including both customer management and front-line components.



The figure above highlights the cost differential between individual transactions for a range of access channels. However, it hides some of the real costs – the chance of getting a ‘right first time’ result via a structured and well-defined web-based process is much higher than getting a similar result via an exchange of white mail correspondence that takes several iterations (and therefore contacts) to complete, and will take much less time.

Complaints are managed by relevant service areas, who have responsibility for resolving the complaint, responding to the complainant and compiling statistics. This results in inconsistent responses being given to customers by different service areas.

Positive customer feedback is not collected and analysed within the Council. There is no comprehensive and coherent mechanism for analysing the root causes of complaints and compliments and using this insight to improve service delivery.

Customer data is generally not shared due to concerns over data protection. Data is held in a number of databases and paper records across the Council, and no single, complete “Customer Record” covering all aspects of the Council’s services currently exists. Many systems, including the Web, do not have a data validation capability, resulting in duplicated and erroneous records. For example, the current customer record management system holds 3 times more address records than there are properties existing in Cardiff.

The current situation of duplication, gaps and inconsistencies in customer data records prevents the Council having a holistic view of customers and their needs. This, and the lack of a single customer record, prohibits visibility of correct data across services areas and availability of accurate management information. Consequently the capacity for development of proactive services and customer self-service via the web are seriously limited because the organisation has very little understanding of customer preferences, and customers will disengage from services if they feel that their data is not being held properly.

The Council has a regulatory requirement to ensure that customer data is not shared inappropriately and has a protocol of authenticating customers before information is given. However, this requirement is often applied by C2C in instances where there is no need for authentication as no data is provided to the citizen, e.g. when reporting fly tipping. Furthermore, different customer authentication processes have been developed across service areas, which can be confusing and frustrating for customers.

The governance of Customer Management is currently fragmented, as follows:

- Face to face is managed by individual service areas who have customer facing services;
- Telephony is managed by C2C or by individual service areas where there are direct lines available to the public;
- Web is managed by Communications with content provided by service areas;
- Post is managed by individual service areas;
- Email and other channels are managed by individual service areas.

Only C2C routinely collects and analyses management information on call volumes, average handling times etc.

Analysis of C2C calls identified that as many as 15% of calls could have been avoided – these were, for example:

- Repeat calls on the same topic;
- Chase-up calls;
- Calls reporting missed appointments;
- Calls to clarify the meaning of documents sent to customers by post.

2.4 Implications for our Customer Strategy

In this section we have shown the importance of continuing to work as a Council to improve our focus on customers, and to what degree we are meeting their expectations. The implications for our Customer Management Strategy are described below.

The strategy needs to reflect the expectations of customers that services will be high quality, responsive, customer focused and delivered in a seamless way across the organisation. Cardiff has a diverse community and we must recognise and meet the needs of all customers wherever possible to ensure we really are customer focussed. Our approach to access must support social inclusion by providing appropriate channels for all groups within society – which needs to include geographical access.

Our current approach is, in some areas, not as customer focussed or inclusive as it could be. Our staff and business processes need to focus on the needs of customers. Such staff and processes are not limited to those directly interacting with or experienced by customers but also include those that provide support and information to front line staff, and those delivering professional services to both internal and external customers. Staff should be empowered and motivated to deliver their best and have the skills and expertise to deliver excellent services to our customers.

Our customers want extended and better access. At present this is mainly available via telephone and face-to-face, all of which offer opportunities for improvement in the quality of the service offered. Equally we need to be better and more consistent in our written communication, and to reduce the outbound use of the post channel to the absolute minimum. Telephone and post will continue to be significant access

channels but we need to work with our citizens to develop their understanding of and confidence in other access methods.

Development of the web and other self-service channels will enable customers to undertake a much wider range of transactions, including submitting applications and reporting all faults, at any time that suits them. This will allow the Council to significantly reduce costs at the same time as providing excellent customer management, and will better enable the Council to deal with budget reduction pressures. This improved capability should be supported by further enhancement of the website, including facilitated access in local Citizen Hubs (where customers can be supported by Council staff to undertake web transactions). We must also reduce the volume of transactions undertaken through high-cost channels, in particular white mail, whilst still allowing those who are most in need to continue to use the channel of their choice.

We must also use the insight and management information gained via customer interactions to improve the services we deliver. In particular, we need a coherent approach to analysing the root causes of complaints and compliments and feeding back corrective or supportive actions to service areas. In order to do this effectively across all access channels, a more centralised approach needs to be taken, with Customer Management forming the conduit for all customer contact and leading the way in driving a more customer-focussed culture in the Council.

There are also other opportunities being presented by new technologies which we currently do not exploit to their full potential, for instance in the use of mobile apps and social networks.

We need to move as much customer-facing work as possible from service areas into the Customer Management function, both to enable economies of flow and scale to be realised and to tackle inconsistencies in customer services across the Council. This should increase the use of the cheapest channels, and improve the customer experience.

The outcomes of the strategy must be an improved customer experience (as reflected in the levels of customer satisfaction) at a lower cost of delivery. These factors drive the vision and priorities of this strategy, as shown in the following table.

Outcome	Description
Connected services	Customer calls are handled consistently, and passed to the appropriate section only when necessary. Calls relating to multiple requests can be dealt with at the point of contact.
Office hours only	Customers can transact certain services independently, at a time convenient to them.
Ability to track progress	Feedback available from service areas on the progress of service requests. Quoted service standards will be measured and results used to drive improvement.
Single view of identified customers	Better understanding of trends in service demand, for individuals and collectively. Data shared safely and appropriately.
First contact resolution	Wide range of transactions can be completed through C2C/Web/Hub or other available channel. Aim to resolve at first contact whenever possible.

Part 3 Customer Management Strategy

This part sets out the principles that will define how the whole Council goes about addressing the needs of its customers.

3 Customer Management Strategy

3.1 Our Vision

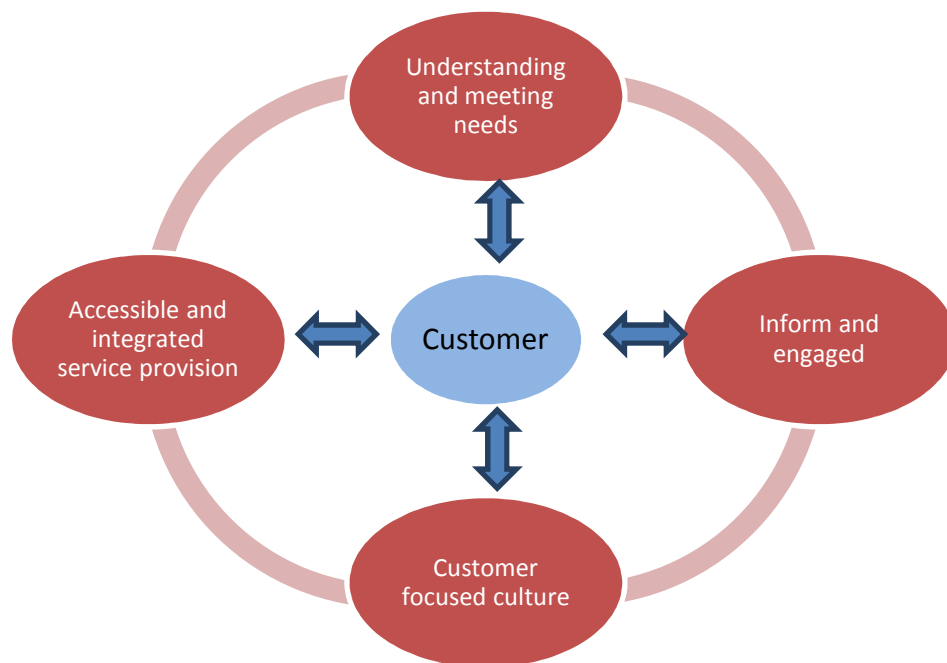
Our vision for Customer Management is:

We will put our customers at the heart of what we do. We will give everyone easy access to services using the methods they prefer, at times that suit them, be it through a personalised customer online account, face to face at a local Hub, over the phone to a member of staff or in any other way we can reasonably provide. We will use technology where it enhances our service delivery and provides better value for money. Creating simpler and more efficient services reduces the cost of delivery services and forms the basis of our Strategy.

3.2 Customer Management Principles

From the vision we have developed four main themes which are used as the basis of our Customer Management principles and strategy:

- Understanding and meeting needs
- Informed and engaged customers
- Customer focused culture
- Accessible and integrated service provision



3.2.1 Understanding and meeting needs

- We will make sure the organisation focuses on the needs of the customers of Cardiff Council.
- We will work with customers to understand what they want and to help them articulate their needs.

- We will work with customers to make them aware of other possible ways of communicating with the Council through new technologies, and support them where possible in using these.
- We will make sure we are listening to all parts of our community and that people feel valued, respected and accepted in all contacts with the Council.
- We will value and respond promptly to comments, compliments and complaints.
- We will tell customers how we have used their feedback.

3.2.2 Informed and engaged customers

- We will make sure customers know what to expect from us and what we can and cannot deliver.
- We will publish and widely communicate customer management standards that are easy to understand so that customers know what to expect from our services.
- We will provide information to customers in clear, simple terms and make every effort to ensure this is available in the appropriate format, taking an equalities approach at all times.
- We will be consistent in the advice and information we provide.

3.2.3 Customer focused culture

- We will give our staff the skills, support and information they need to do the best job they can for customers.
- Our staff will be polite, courteous, respectful and helpful in all dealings with customers.
- Our customer-facing staff, wherever they are, will be empowered and supported by the whole organisation to deal with and solve customer queries / problems.
- Our staff will be trained in how to deal with customers, and the training will ensure that an equalities approach is taken at all times.
- We will work across all functional and organisational boundaries to meet customer needs in a seamless way.

3.2.4 Accessible and integrated service provision

- On most occasions customers should be able to have issues dealt with at the first point of contact. If we cannot fulfil the request at first point of contact we will advise when we will be able to do so, what action will be taken - and we will keep to the given timescale.
- We will provide a safe, friendly and welcoming environment for customers and show respect for their privacy.
- We will try not to keep customers waiting needlessly or without explanation or apology.
- We will be flexible and give customers choices about how to contact the council, having due regard for customers' needs and the Council's resources.
- We will treat all our customers fairly and ensure services are as accessible as possible giving consideration to individual circumstances and needs.
- If we cannot do something that a customer requests we will say this and explain why, and offer alternatives if possible.
- We will create a set of local Citizen Hubs across the city in order to fulfil a wider range of customer requirements than at present.
- We will extend the capability of the web channel and support access via this channel to those without internet access by providing internet access within Hubs, and assisting customers to use this access.
- Where customers have specific needs, we will provide whatever help and support we reasonably can to ensure they are able readily to access information and

services; this includes interpretation for people whose first language is not English or Welsh, and making Council facilities as accessible as possible to those with disabilities.

- Customers should be treated consistently across all Council services and across the various access channels, with the same quality of customer experience and service delivery.
- Customers should not have to provide the same information to the Council more than once.
- We will provide clear, straightforward responses, free of jargon.

3.3 Our Strategic Targets for Customer Management

Our success in delivering the vision for Customer Management will be judged against the following:

3.3.1 Customer Experience

The quality of the customer experience will be assessed by a range of measures of customer satisfaction, based on customer journey mapping, that will assess the following:

- Accessibility and timeliness of services;
- Provision of information to customers, e.g. about the progress of an application;
- 'Tell us once' with regard to personal data – customers give their data to the organisation once only;
- Staff courtesy;
- Consistency of experience through different channels and at different points in time;
- Staff knowledge and capability of dealing with customers' queries;
- Service requests completed in a timely fashion and to the satisfaction of customers;
- Simple, effective processes for resolving customer issues;
- Clarity and consistency of communications;

3.3.2 Process

Key process measures will be orientated around what customers actually experience when interacting with the Council, rather than intra-departmental measures.

Measures will include:

- Proportion of requests resolved at first point of contact;
- Time taken to fulfil customer request, from first contact to final fulfilment (end-to-end time);
- Avoidable contact rate;
- Channel shift measures;
- End-to-end process cost, by channel.

3.3.3 Staff values and behaviours

Staff will be required to complete a customer management module at the Cardiff Academy and the following measures of staff attitudes and behaviours will be incorporated in an annual staff assessment:

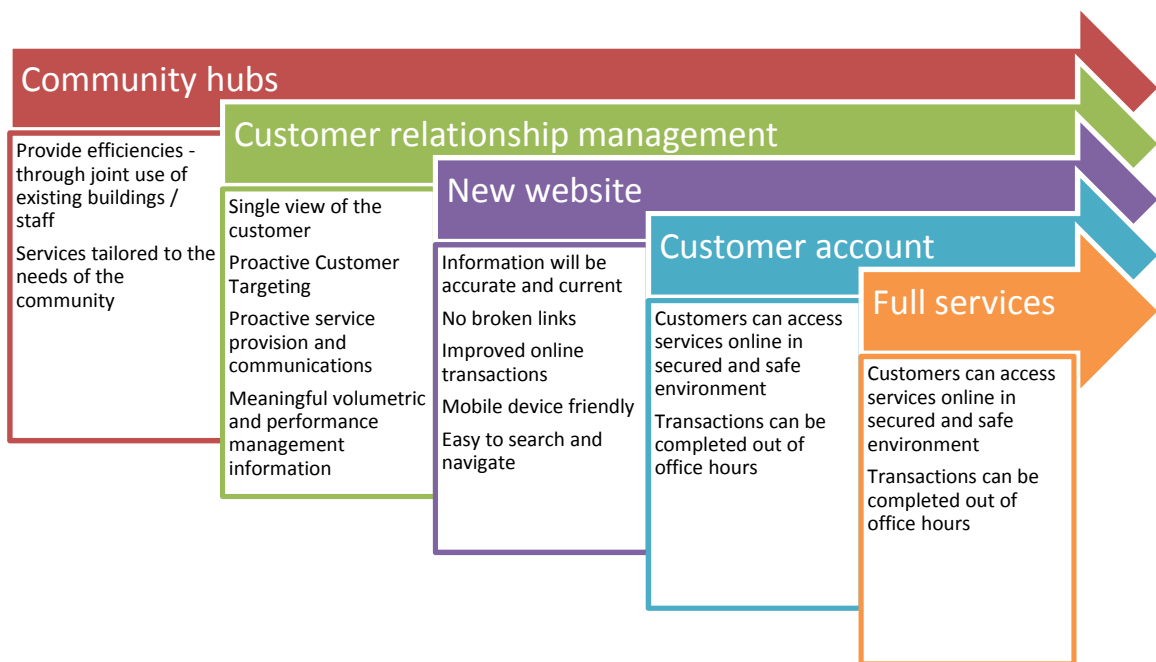
- Customer focus;
- Innovation;
- Partnership working;

- Non-bureaucratic 'can do' attitude;
- Focus on quality and performance.

3.3.4 Accessible and integrated service provision

The following measures will be used to assess performance in providing accessible and integrated services:

- Percentage of Council buildings open to the public in which all public areas are suitable for and accessible to disabled people;
- Number of types of interactions that are enabled for electronic delivery;
- Number of people assisted in Citizen Hubs to complete transactions electronically.



In support of these targets, it will be necessary to develop a framework of Service Level Agreements (SLAs) between service areas and Customer Management that aims to ensure that the right behaviours are exhibited by both parties in dealing with customer contacts and requests. These SLAs will be managed within the governance framework outlined in section 3.6 below.

Key Performance Indicators (KPIs) relating to all the above measures will be further developed and finalised as part of the Customer Management programme.

3.4 Avoidable Contact Strategy

In order to improve customer satisfaction and reduce operating costs we will seek to avoid unnecessary customer contacts by streamlining processes, developing joined up services and increasing first contact resolution rates. We will ensure that the volume of work being presented to the Council is minimised, and in particular that avoidable contacts (failure demand) are eliminated wherever possible. Examples of avoidable contacts include:

- Progress chasing of any sort;
- Repeat contacts to provide or seek information that could have been provided at the first contact;
- Repeat contacts generated as a result of the correct Council resources not being available at the time of first contact;
- Repeat collection of personal or other details that have already been provided to the Council at an earlier point in time;
- Repeat contacts to pay for a service when an automated payment mechanism could have been put in place.

We will work with Service Areas to design end-to-end processes that reduce avoidable contacts by incorporating the required features in process design and monitoring avoidable contacts on an ongoing basis.

3.4.1 Performance Management and Governance

- Customer Management will have the day to day responsibility for Cardiff Council's Avoidable Contact Strategy and its implementation.
- A Customer Management Improvement Officer should be appointed to have day to day responsibility for the strategy of minimising avoidable contact, working closely with Service Heads.
- Contact data across our main contact channels will be measured and analysed by Customer Management on a monthly basis

3.5 Customer Management Governance

The evolution and implementation of the Customer Management Strategy will be governed by a newly created Joint Customer Management Board. This will be attended by relevant service area and Customer Management staff, and will monitor end-to-end customer service performance and sanction corrective actions to address performance deviations.

There will also be a Web Governance Board which will be responsible for ensuring the web site remains effective as a primary customer access channel; and a Hub Management Board which will monitor customer activity at Citizen Hubs. It is possible that, as the governance arrangements mature, the roles and activities of these boards can be consolidated.

Part 4 Access Channels

This part sets out our approach to developing and managing customer access channels, migrating contacts to more cost-effective access channels whilst extending the range of options for customer access and maintaining the options needed or valued by those unable to use new channels.

4 Access Channels

4.1 Overarching Approach

In order to enhance customer experience and realise significant cost reductions we will:

- Make access to our services available through **appropriate and cost effective access channels** designed with the needs and preferences of our customers in mind;
- Encourage greater usage of the most effective contact methods, by creating a series of **deliberate and targeted channel shifts**;
- Create a positive experience for our customers through **new access channels and types of interaction**. This will generate trust, improve service delivery and reduce hidden costs to our customers and to us;
- **Actively encourage Service Areas to work together** and with other service providers. Shared values, goals and data will improve service delivery;
- **Learn and innovate continuously** by monitoring successes and regularly reviewing customer feedback on all access channels;
- **Identify savings** by analysing customer experience and **end to end cost to serve data** and continuously improve services based on analysis findings.

4.2 Access Channel Preferences

Whilst catering for the needs of a wide range of customer segments in contacting the Council, we will express a preference for customers to contact us via the most cost-effective channel(s) for each transaction type and service area.

Whilst there is an overriding duty of the Council to provide access to its services to all customers in line with their specific personal or organisational needs, in reality the vast majority of the Council's customers are able to access services through many of the available channels. The economic realities of the current financial climate require local authorities to have regard for value for money in the way they deliver services to customers, and accordingly it is right for the Council to express a preference for customers to use more cost-effective channels.

4.2.1 Preferred Channels

The Council's preferred access channels are as follows:

1. **Web:** Once the initial investment in technology has been incurred, web access to services is by far the least costly access channel and also offers substantial benefits to customers, including:
 - 24/7 access
 - Availability from almost anywhere
 - Ability to work at a pace that suits the customer rather than the organisation

For these reasons the Council will work towards a substantial expansion of the range of transactions that can be undertaken by customers via the web, and will promote the web channel as the channel of preference for the majority of requests.

2. **Telephone self-service:** Telephone self-service is already used for a range of (predominantly payment) transactions, is low cost, and has significant potential for expansion into other transactions.

3. **Phone:** Contact by phone is the Council's second preference access channel. The majority of contacts are currently made via this channel and it is inevitable that it will remain a very significant channel, both for accessibility reasons and because a dialogue with a human being is required to successfully fulfil the request.
4. **Face to Face:** Whilst a relatively high-cost channel, the end-to-end resolution of some transactions may be best facilitated in a face-to-face environment. For example, the overall cost and timescale for processing Benefits claims from customers whose first language is not English or Welsh may be lower if the transaction is conducted face-to-face than it may be via alternative channels. As there are groups of customers who will either be unable to access cheaper channels, or will need help to do so, face to face contact will still be offered via Citizen Hubs.
5. **Apps:** Many citizens who do not have access to the internet on a home computer do have such access via a smartphone. As the functionality of the web site is enhanced, applications for smartphones and tablets should be developed in parallel to provide equivalent access to citizens with these devices.

4.2.2 Non-Preferred Channels

The following channels are **not** preferred by the Council and will be discouraged for general use, although they may be promoted for specific customer segments that have needs that are best served by these channels:

1. **White Mail (Post):** At present post accounts for an estimated 23.5% of all customer contacts across the Council, but an estimated 60% of the cost. Therefore, a 10% reduction in the volume of mail received from customers could result in a possible saving of £700k p.a. to the Council. Generally in society post is being replaced by web transactions, email and other channels as a communications medium and in line with this trend the Council will rigorously seek to reduce the volume of post received from customers. Much post is received as a result of a postal communication being sent to customers from the Council, so the starting point for a post reduction programme will be a review of outbound post.
2. **Email:** This potentially counter-intuitive conclusion is based on the fact that, without substantial investment in automated email handling systems, free-format emails need to be processed as if they were white mail, and therefore cost the same as post to process. Automated email handling systems may also fail to give the specific responses demanded by Council customers. Customers will be encouraged instead to use structured web forms as a way of communicating electronically with the Council.
3. **Face to Face:** Whilst continuing to make the face to face channel available (and indeed improve it via Citizen Hubs) for those who need it, the Council's general strategy will be to reduce the use of this channel for general transactions that can be conducted at lower cost through other channels. Initially this may be through the introduction of facilitated web access in Citizen Hubs, where a Council staff member assists customers in accessing services through a computer connected to the web. Traditional face to face transactions such as cash payments will be encouraged to shift to bank transfers or automatic cash payment machines.
4. **Text (SMS):** Text messages have considerable potential to be used as an outbound customer contact channel, for example to confirm appointments or provide information to a customer about the progress of a service request. SMS also has potential as a convenient inbound channel, for example for

simple payments such as on-street parking charges (this is already used by many councils to avoid cash being left in on-street machines).

4.3 Channel Shift

We will design cost effective, efficient, accessible and user friendly ways of contacting the Council and then encourage our customers to use the access channels that work best for them in the light of their needs and the Council's priorities. Subject to further development work, including customer consultation and validation, we intend these changes to focus upon:

Web

We will provide a single, comprehensive, easy to access and up-to-date web site that allows anyone to transact and interact with the Council 24/7. This will include a customer self service account that will allow access to more sensitive services that require customer authentication and/or validation.

Telephone

We will minimise the number of published contact telephone numbers, reduce the number of call transfers required in order for citizens to be able to speak to someone that can resolve their query and make the customer experience streamlined and simple

Mobile Apps/SMS

We will use developments in mobile phone technology to provide better access to information and services for customers, and to support end-to-end process redesign to improve 'right first time' transactions, thereby reducing costs and increasing service efficiency.

Face to Face

We will maintain our face to face services, but to provide these services in more appropriate and cost effective locations by fully trained expert officers, focusing on those services and customer segments that benefit most from this channel.

Post/White Mail

We will reduce the amount of inbound and outbound post and paper communication by better use of electronic channels. Our aim is to significantly reduce the volume of paper-based correspondence by April 2015.

Email

We will reduce inbound email communication through better use of online electronic forms, self-service transactions and alternative digital access channels

New Media (including social media)

We will continue to explore opportunities to deliver customer service through new media but will position Cardiff Council slightly behind the cutting edge of such developments to avoid abortive expenditure on media that prove not to be popular.

4.4 Access Channel Governance

Ownership of Cardiff Council's Access Channel approach will be the responsibility of the Customer Management Team.

Cardiff Council's access channels are not currently managed or developed centrally and there is no corporate policy for customer contact. As a result of this situation different Service Areas handle customer contact in different ways and customer journeys and experiences are varied.

In support of these targets, it will be necessary to develop a framework of Service Level Agreements (SLAs) between service areas and Customer Management that aims to ensure that the right behaviours are exhibited by both parties in dealing with customer contacts and requests. These SLAs will be managed within the overall Customer Management governance framework.