



Middlesbrough
moving forward

Customer Strategy 2015-2018





CUSTOMER STRATEGY

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INTRODUCTION

Our vision is to embed customer excellence throughout all aspects of service delivery, for both internal and external customers alike; this document provides a roadmap of how we will achieve this during 2015-2018.

This work will align fully with the Change Programme outcomes and projects, taking into full consideration the Change Programme Principles which will govern the approach taken to delivering the changes required and with which all future services must align:



Our ambition is that a customer-centric culture, Council self-serve facilities, improved payment facilities and transactional online services, will be underpinned by a simple, service led and driven website and intranet, with straight-to-the-point e-forms, all underpinned by a knowledge-based customer relationship management system, reducing the need for face to face contact.

Customers will experience an overall improvement and flexibility in their choice of how to access Council services and the drive for 'digital by default' will increase access to Council services as a result; this document will lay out plans of how to meet this requirement.

VISION:

We will transform our delivery of services over the next 3 years, providing customers with excellent service and access to self-serve through an extensive range of e-services.



BACKGROUND

In April 2013, Executive approved the initiation of the Council's Change Programme to meet the challenges presented by unprecedented and ongoing financial contraction within local government, while at the same time maximising the Council's contribution to the 2020 Vision for Middlesbrough.

As a result, the Council's operating model is changing from it being a default provider of services to that of a default commissioner of outcomes, while maintaining its overarching responsibility for ensuring the social, economic and environmental wellbeing of the town.

To achieve this we are creating a culture where: there is strong political leadership and accountability; local need is identified and met; collaboration and joint-working opportunities are maximised; income generation is maximised; and an appropriate service delivery models are employed.

The Council's Customer Strategy will be fundamental to the effective implementation of the Council's target operating model and the delivery of its strategic objectives. It will:

- embed a culture of customer excellence within all services;
- deliver digital-by-default across all appropriate transactions; and
- ensure that customer voices are heard and addressed within the Council's business planning and performance management.

We deliver a wide range of support and services to residents and our aim is to provide excellent customer service. We want and need to deliver a high level of customer excellence, whether dealing with internal or external customers.

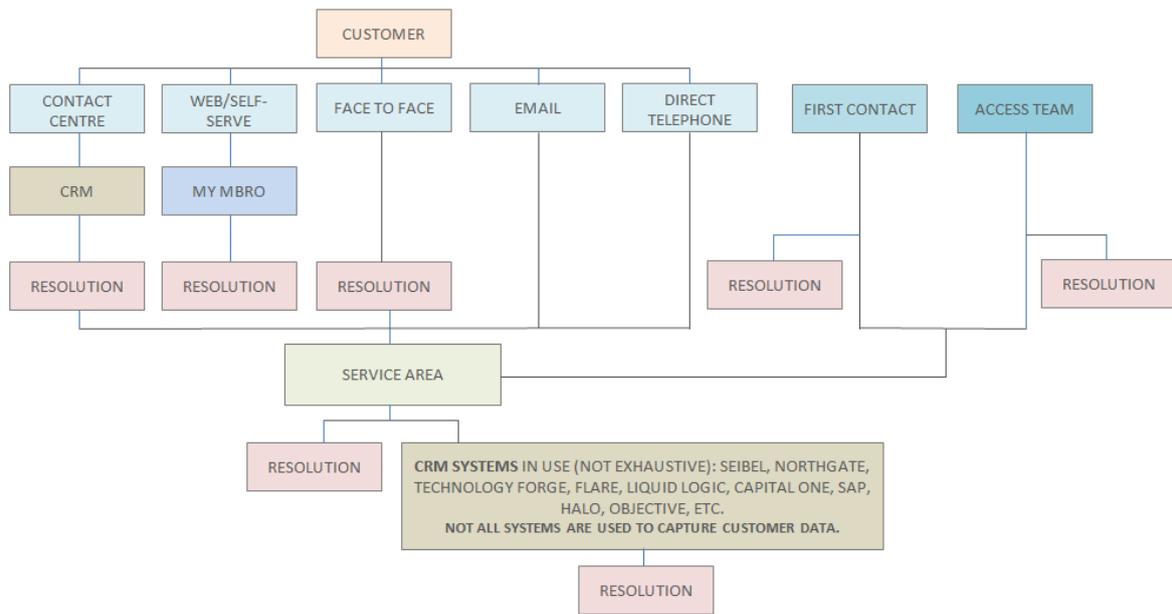
Currently there is no real consistency in methods of monitoring and managing customer access, reducing the opportunity to manage contact effectively or ascertain a performance baseline, due in the main to a disparate number of back-office systems in use.

Historically, some systems have been retained throughout previous service area restructuring, whilst others have been implemented independently for specific service areas. The vision for the future is to develop an initial level of integration with the contact centre and CRM system to allow for enquiries, service requests and initial assessments to be completed at first point of contact.

These systems will be encompassed within a phased integration plan, as part of the customer strategy milestone plans.



The diagram below illustrates how general contact is currently made from customers, as well as the First Contact and Access Teams. Full consideration of their working requirements will be taken into consideration throughout first contact resolution.





CUSTOMER EXPERIENCE

Our current delivery of services is segmented; lacking in consistent customer focus.

If we do not keep pace with cultural and IT developments in customer services, it will result in missed opportunities for our customers. As customer focus is a theme running throughout the Change Programme - our strategic plan for the next 3 years - our existing ways of working must reflect this.

Technology has undoubtedly changed consumer behaviour; customers already use the internet and mobile phones for almost everything from making enquiries, paying bills, browsing, purchasing and online streaming. Customers now have the same level of expectation when dealing with their local authority; looking to interact with the Council 24 hours a day, 7 days a week, 365 days a year, without having to wait for office opening hours, or travel into town.

The Middlesbrough 2020 Vision sets out a vision for Middlesbrough to be 'the place to live, work and visit', supported by three strategic aims:

- A town that is clean, safe and healthy;
- A learning town, in which families and communities thrive; and
- A town that continues to transform.

Customer service is an extremely important part of maintaining an ongoing relationship. Whilst there will be many more people working behind the scenes than there are customer service representatives, it is primarily the front-facing staff that interact directly with customers and it is this interaction which forms customers' perceptions of the Council as a whole.

By its very definition, customer service is the process of ensuring customer satisfaction with a product or service. Often, customer service takes place while performing a transaction; however customer service can take the form of an in-person interaction, a phone call, self-service systems, or by other means.

In order for this transformation to be achieved, we will compare our service with those offered by commercial organisations in terms of customer journey and experience; proactively engaging with customers, reaching out to them and delivering a personalised service, with additional support for those vulnerable groups, who make up our highest volume of customers.



CHANNEL SHIFTING

Our customer strategy is aligned to our other strategic planning, including the Change Programme and its principles to ensure successful implementation, adopting a 'customer first' approach to services to best serve the local community, fulfilling an existing demand.

This will enable us to demonstrate investment in staff, their welfare and encourage their development; endeavouring to reject the drive of processes and instead acting with a view to adding value.

The same culture will be adopted towards external customers; customer standards influence culture, defining the way we interact with customers.

CULTURE:

In order to fully embed a consistent, cohesive and coordinated customer-focussed culture, development and roll-out of a customer charter alongside a detailed training programme, tailored to employee groups is vital. Further work and implementation is required to ensure our staff receive training aimed at both a strategic level; making certain that confidence and competency in strategic customer-focussed delivery is cascaded to staff on a day to day basis, as well as ensuring staff are equipped with resources and information on how to best serve customers and deal with their enquiries. This development will link and coordinate with the Middlesbrough Manager Programme and Middlesbrough Learns, the online e-learning tool, which will also be used as an ongoing learning reference going forward.

This change in culture will be enabled through a full marketing campaign, illustrating a change in service delivery for our customers, for the better. Redesigning the layout of reception areas with the focus on self-serve, touch-screen technology and additional available staff actively supporting customers in its use, with a reduction in desk staff and cashiers, is an aggressive shift in directing customers to Council services, rebranding Middlesbrough House as the single customer service point in Middlesbrough town centre.

INFORMATION SYSTEMS:

A Customer Relationship Management (CRM) system is essential to doing business and providing better customer service. Whilst technical solutions will enable this approach, CRM is actually just as much about cultural and process change as it is about new technology. Numerous local authorities have now progressed to using a single front-end CRM system to contend with the challenges of growing customer service expectations and shrinking financial resources, requiring new tools to promote customer engagement and Council responsiveness.



A common infrastructure across the whole Council will ensure consistency of information and will embed a customer-focused culture. Currently, there is no uniformity across services and systems as to when and what customer data, if any, is collected.

Establishing and conforming to this infrastructure will manage the vast majority of customer enquiries at first contact where possible, offering access to a range of Council services and removing the necessity for customers to navigate a range of service directories.

Implementation of the CRM system and redesign of website and staff intranet is scheduled for completion by April 2016.

E-SERVICES:

Enabling a simplified, service-led website, backed up by a fully-integrated, knowledge-based CRM system will ensure that customers become digital by default; customer demand for Council services will not reduce, in fact with the drive for 'digital by default', access to Council services will increase as a result. The current working model - if continued - will either break down; ensure additional costs, or both - standing still is not an option.

My Middlesbrough, found on our website is the range of online services and e-forms which promote the idea of self-serve for customers. Whilst the foundations have been laid, there is still much work to do in terms of integrating completed e-forms to a single CRM system, allowing for first point of contact resolution for customers.

Commissioning an external web-design company to undertake the redesign and development of both the website and staff intranet is key; to enable a simple service-led and service-driven designed interface which can further build upon the work that My Middlesbrough has started. The CRM and website development work will also inform the restructuring of the contact centre and other access points during 2015/2016, following the return of Mouchel services to the Council.

CUSTOMER ACCESS:

Whilst an appreciation of the different access routes customers prefer should be considered, there is requirement to encourage our customers to move away from face to face contact, where appropriate and consider the importance of what customers need versus what customers want.

Customer access in Middlesbrough House is currently dictated by a large number of reception staff and cashiers dealing with face to face enquiries, within minimal staff assisting and guiding customers in the self-serve area. A reversal in this structure will ensure that those vulnerable groups of customers will be fully supported in this channel shift process, whilst those still requiring face to face access will still have that option, albeit significantly reduced.

In order to become digital by default, whereby all public services should be delivered online or by other digital means, then Council services need to be accessible to all; simplistic, service-led interfaces



will attract users; whether older people, those with English as a second language, customers with learning difficulties, young people, etc. 24 hours a day, 7 days a week.

Digital services will be of a consistently high quality; this includes creating services that are easily improved, safe and secure and which fulfil user needs. Self-serve will drive forward this shift to digital by default; a format which should be replicated in all community hubs, along with the presence of

touchscreen self-serve technology for self-serve access. Accompanied by a full marketing campaign to customers this will raise awareness of the benefits in channel shift and self-serve.

Enquiries from Councillors, service requests, complaints, compliments or indeed any feedback will all be directed through the contact centre or self-serve facilities, which will assist in the channel shift process. Responses in terms of timescales, house style and etiquette will be professional and consistent across the Council, regardless of the source, allowing for comprehensive customer profiles to be built, as well as building contextual knowledge and producing accurate management information.

Each Council service area will nominate “Information Champions”, who will be responsible for constant and regular cross-communication, sharing of information and consistency in approach within the contact centre staff; using schedules of planned works over the next financial year to pre-empt peaks in customer enquiries, ensuring accuracy of information and first point of enquiry resolution. This is a better use of staff time, allowing for increased numbers of customers being dealt with.

This allows for staff to develop skills in other areas, improving career progression, ensuring that they are competent in resolving enquiries, regardless of their complexity. Customers are less likely to be transferred or sent away with unresolved enquiries, therefore improving satisfaction.

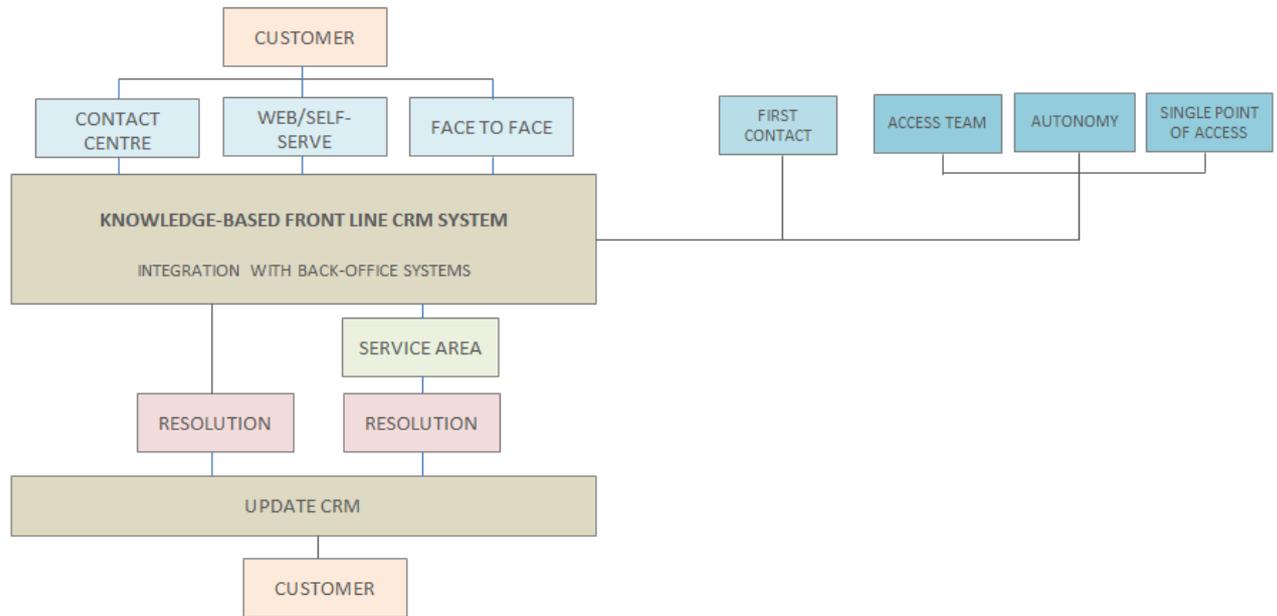


THE FUTURE

Defining and embracing our customer principles will shape activity and behaviours. We will reengineer customer access to services, tailoring provision around customer needs.

Face to face channels will be significantly reduced, with the emphasis on self-serve and contact centre resolution. Whilst there are currently independent systems being developed, launched and managed across the services provided for both Adults and Children, they too will be integrated through the single CRM system to a point (taking into consideration data protection and Information Governance), to allow contact centre staff to undertake initial assessments, deal with entry level enquiries and take referrals, etc.

The diagram below illustrates our vision of how services will be accessed in the future with full use of self-serve and a knowledge-based CRM system.





Wherever possible, all customer enquiries will be dealt with and resolved at first point of contact ensuring that the customer journey is documented through the single CRM system and that the customer is kept informed of how the enquiry progresses, including notification of enquiry conclusion through the use of automated templates via email and self-serve systems.

MEASURING SUCCESS :

Key outcomes and targets will be identified to measure the success of the Customer Strategy, such as:

- Improved customer satisfaction
- Increase in volume of enquiries dealt with at first point of contact
- Improved staff satisfactions
- Improved staff retention
- Change in profile of customer access
 - Reduction in volumes of letters received
 - Reduction in volume of face to face contact
 - Increase in self-serve and contact centre access
- Reduction in costs per transaction
- Management of data/information is improved and streamlined

PHASE 1: DEVELOPMENT (February 2015 – May 2015):

The first element of work following the appointment of a Customer Lead was to conduct meetings with key stakeholders to assess current ways of working, reviewing projects and functions relating to Customer Strategy and to develop a new approach to customer excellence.

These meetings benchmarked views on how Council services, processes and systems could become more customer focussed. The outcomes of these meetings focussed on several themes which have formed the basis of the Customer Strategy Document.

Within the Customer Strategy, 9 projects have emerged have emerged from these 4 themes, which will be managed throughout Phase 2: Implementation.

PHASE 2: IMPLEMENTATION (June 2015 – December 2017):

Whilst overall accountability for the Customer Strategy will reside with the Council, delivery responsibility will sit with the Executive Director of Commercial and Corporate Services.

Implementation of this strategy will focus on several themes, each of which has within them a number of projects, with assigned project leads.



For a full break-down of projects and timescales, please refer to page 12.

PROJECTS

The Customer Strategy contains four themes, whilst the following projects contained within. Delivery of these projects will; take place throughout 2015-2018:

THEME:	PROJECT:	
CULTURE	1	STAFF DEVELOPMENT PROGRAMME
	2	CUSTOMER CHARTER
INFORMATION SYSTEMS	3	CRM
E-SERVICES	4	WEBSITE/INTRANET/CUSTOMER PORTAL
	5	SELF-SERVE
	6	E-FORMS/MY MIDDLESBROUGH
CUSTOMER ACCESS	7	MIDDLESBROUGH HOUSE REBRAND/REDESIGN
	8	CHANNEL SHIFT
	9	



	CONTACT CENTRE REVIEW
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PROJECT:		OVERVIEW:	PROJECT LEAD
1.	STAFF DEVELOPMENT PROGRAMME	To design and develop a detailed and ongoing staff development programme, tailored by department in terms of practical training and access to online toolkits going forward, linking to the MM/ME training programme to drive forward a customer focussed culture.	WFD
2.	CUSTOMER CHARTER	To create, develop and embed a customer charter across the Council, encompassing the vision for a customer-centric focus throughout all service areas.	CUSTOMER LEAD
3.	CRM	Source, procure and implement a single knowledge-based CRM system to manage customer contact, gather and utilise effective management information; building a single customer profile.	ICT
4.	WEBSITE, INTRANET AND CUSTOMER PORTAL	Commissioning of an external web-design company to undertake the redesign and development of both the Council website and staff intranet, including a customer access portal, ensuring staff and customers alike become digital by default.	MARKETING & COMMUNICATIONS
5.	SELF-SERVE	Reshaping and developing the tools necessary to allow customers to become fully self-sufficient in their dealings with the Council such as self-serve capabilities, touch screen technology, online payments, etc.	CUSTOMER LEAD
6.	E-FORMS AND MY MIDDLESBROUGH	Increase the number of e-transactional services which can be accessed via self-serve via Council website; an entirely service led and driven hybrid of My Middlesbrough and a smartphone display. Easy-to-interpret e-forms which recognise returning customers, auto-populating their data and allowing the CRM system to build a customer profile/demographic, creating a single view of each customer.	CUSTOMER LEAD
7.	MIDDLESBROUGH HOUSE REBRAND AND REDESIGN	Roll out a full Middlesbrough/Tees Valley-wide marketing campaign informing customers and visitors to the area exactly what the channel shift process is and be default, highlighting the benefits of self-serve. Work to be undertaken on the lay-out of MH reception to reflect channel shift; reducing staff numbers on reception/cashiers, etc. and increasing self-serve support assistance.	CUSTOMER LEAD
8.	CHANNEL SHIFT	Drive forward an aggressive channel shift in terms of how customers access Middlesbrough Council services; reducing face to face and encouraging self-serve via Council website and contact centre in conjunction with the marketing campaign detailed in Project 7 above.	CUSTOMER LEAD
9.	REVIEW OF CONTACT CENTRE	Review requirements of customer access and contact centre to best suit customer needs going forward.	PERFORMASNCE & PARTNERSHIPS



KEY MEASURES OF SUCCESS/BENEFITS:

- Improved customer satisfaction
- Increase in volume of enquiries dealt with at first point of contact
- Improved staff satisfaction
- Improved staff retention
- Change in profile of customer access
- Reduction in volumes of letters received
- Reduction in volume of face to face contact
- Increase in self-serve and contact centre access
- Reduction in costs per transaction
- Management of data/information is improved and streamlined

CHANGE PROGRAMME PRINCIPLES:

- Ensuring standards
- Customer excellence
- Developing cooperative services
- Digital by default
- Improving commerciality
- Balanced scorecards
- Optimising ICT
- Agile working