

Scrutiny Board

1 March 2016

Report title	Tracking and monitoring of scrutiny review – Channel Shift	
Cabinet member with lead responsibility	Councillor Andrew Johnson Resources	
Wards affected	All	
Accountable director	Kevin O’Keefe, Governance	
Originating service	Customer Services	
Accountable employee(s)	Sue Handy	Head of Customer Services
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Report to be/has been considered by	N/A	

Recommendation(s) for action or decision:

The Scrutiny Board is recommended to:

1. Consider progress made to implement recommendations from the Channel Shift Scrutiny Review.
2. Agree to close the review on the basis that the recommendations are being implemented as detailed in the report.

1.0 Purpose

- 1.1 The purpose of the report is to update Scrutiny Board on progress of the implementation of recommendations resulting from the Channel Shift Scrutiny Review undertaken in 2014/15 and seek to sign it off.

2.0 Background

- 2.1 The aim of the review was to consider the new channels available to customers and ensure that none of them were left behind as well as to ensure that the customer service the City of Wolverhampton Council delivered was the best possible available in this regard.
- 2.2 The review group met on four occasions to hear evidence about the changes involved in channel shift, the services that would be procured and how residents would be informed of the changes. Councillors on the review group also visited the contact centre to gather evidence.
- 2.3 The questions the review group responded to were:
- What services can City of Wolverhampton Council provide digitally that will retain a high level of customer service, whilst also improving value for money?
 - What training is required for the workforce to be confident to deliver a digital service?
 - How can City of Wolverhampton Council encourage users to choose digital methods of communication?
 - How will City of Wolverhampton Council ensure that the channel shift strategy is adopted by the whole organisation?
 - How can the benefits of channel shift be realised, tracked and monitored?
 - What work can be done with external stakeholders to develop channel shift within the authority?
 - What will channel shift look like in the future, and which technologies should be embraced and used for the long term?
 - What work have other authorities undertaken with regards to channel shift, and what challenges did they face, and what benefits did they gain?
 - How will hard to reach customers be addressed?
- 2.4 The review group worked with Sue Handy, Head of Customer Services, Paul O'Rourke, Channel Shift Manager and Saty Sandhu, Operations Manager.
- 2.5 The review report and executive response were reported to Cabinet on 23 June 2015.

3.0 Recommendations of the review

- R1 To introduce a risk register for the channel shift, identifying potential risks at each stage and ensuring these are included in the procurement new systems. This could be incorporated into the Corporate Risk Register and should include but not be restricted to:

1. The risks involved with a system being heavily reliant on technology and electricity supply.
2. Sensitivity monitoring within an Integrated Customer View.
3. The risks involved in passing responsibility of safeguarding information to an outside provider. This includes other organisations using the same cloud space and the security level of personal information.

- R2 To develop a channel shift communication plan which focuses on employees and external customers outlining the changes being made and the timescales involved, how it will affect them and the help available and how they can get involved and give feedback.
- R3 To endorse the implementation of the “my account” feature integrated into the customer view of the CRM system to allow residents to easily see the transactions they have previously made and customise the services that they view. This could include information about the customers ward councillors, local provisions e.g. refuse collection and road works, and local events taking place.
- R4 To ensure that all systems procured in the channel shift are future-proof. This includes ensuring the ContactPortal is updated regularly and system suppliers can be changed should the leading supplier of a service change whilst not requiring anything extra from the customer.
- R5 To endorse the role of the Customer Services team on the Civic Centre concourse in guiding customers through the digital channels on tablets and PCs.
- R6 To ensure customer satisfaction is monitored regularly and changes are made based on the feedback received.
- R7 To illustrate the positive work of the Channel Shift and Customer Services teams by ensuring all compliments received are publicised.
- R8 To use SMS messaging as a form of contact with customers in confirmation of services booked and reminders of booked appointments or forthcoming renewals. This should be included in the procurement of a CRM Solution.
- 3.1 The executive response pro-forma and update to the review recommendations is attached (appendix one).

4.0 Progress

- 4.1 Progress to date is detailed in the Executive Response at Appendix 1.

5.0 Financial implications

- 5.1 The recommendations are being met from within existing resources.

[MK/17022016/X]

6.0 Legal implications

6.1 There are no direct legal implications associated with the recommendations.

[TS/1602016/C]

7.0 Equalities implications

7.1 There are no direct equalities implications arising from this report. A full equality analysis has been undertaken on the Channel Shift programme relating to Customer Services. Progression of the individual recommendations relating to channel shift (especially R2 – R8) are subject to on-going equality analyses.

8.0 Environmental implications

8.1 There are no environmental implications.

9.0 Human resources implications

9.1 There are no human resources implications.

10.0 Corporate landlord implications

10.1 There are no corporate landlord issues.

11.0 Risk Implications

11.1 The report recommends the creation of a risk register so that risk implications for channel shift are understood and appropriate mitigations implemented.

12.0 Schedule of background papers

12.1 Channel Shift Scrutiny Review, Cabinet, 23 June 2015.

Appendix 1
Executive Response: Channel Shift Scrutiny Review

Terminology

- VERTO – Project management system**
- CRM – Customer Relationship Management (system)**
- RFI – Request for information**
- CEP – Customer Engagement Platform**

Recommendation 1		
<p>To introduce a risk register for the channel shift, identifying potential risks at each stage and ensuring these are included in the procurement new systems. This could be incorporated into the Corporate Risk Register and should include but not be restricted to:</p> <ol style="list-style-type: none"> 1. The risks involved with a system being heavily reliant on technology and electricity supply. 2. Sensitivity monitoring within an Integrated Customer View. 3. The risks involved in passing responsibility of safeguarding information to an outside provider. This includes other organisations using the same cloud space and the security level of personal information. 		
Comment	Timescale/progress so far	Officer Responsible
<p>Accept. The Customer Service Transformation board and its relevant sub-groups are the key forums to establish and monitor the risk register. All Council representatives will be fully briefed on the outcome of the Scrutiny Review to ensure that they understand how their work plan feeds into the corporate risk register.</p>	<p>A risk register is in place using the project management solution VERTO. This is specifically being used for migration of services into the Customer Service department but will now also extend to optimisation of the department through channel shift initiatives.</p> <p><i>A risk register continues to be maintained through VERTO. The Digital Transformation Programme, which is an enabler for the Customer Services Transformation Programme, also holds a risk register around website optimisation which will surface transactional content (services) to customers via online/digital channels.</i></p>	<p>Head of Customer Service, Performance Manager, Customer Services (Corporate)</p>

Recommendation 2		
To develop a channel shift communication plan which focuses on employees and external customers outlining the changes being made and the timescales involved, how it will affect them and the help available and how they can get involved and give feedback.		
Comment	Timescale/progress so far	Officer Responsible
<p>Accept. The Customer Service Strategy shall underpin the requirement for strong internal communication across all directorates with tools in place to monitor and evaluate staff engagement and understanding.</p>	<p>A channel shift e-learning programme is to be made available on The Learning Hub with face to face sessions to be arranged for workforce without PC access such as street cleaners or catering staff. Currently it is expected to be ready for roll out in July 2015.</p> <p><i>The channel shift e-learning module was completed in December 2015 and is now 'live' on The Learning Hub. A roll out plan is being co-ordinated by the Organisational Development Team.</i></p> <p>The corporate communications team attend weekly channel shift team meetings to stay fully abreast of updates relating to upcoming initiatives or trends noted in customer behaviour. This is with the view to the communications team broadcasting salient successes, issues or products to employees through various channels – City People, core brief etc. <i>This continues to occur on a weekly basis.</i></p>	<p>Performance Manager, Customer Services (Corporate)</p> <p>Organisational Development</p>

Recommendation 3		
To endorse the implementation of the “my account” feature integrated into the customer view of the CRM system to allow residents to easily see the transactions they have previously made and customise the services that they view. This could include information about the customers ward councillors, local provisions e.g. refuse collection and road works, and local events taking place.		
Comment	Timescale/progress so far	Officer Responsible
<p>Accept. This work shall begin in August within the gift of the existing CRM and website platforms. Any development will be advertised fully to</p>	<p>The tip permit process has launched online on the Council website with council tax bills being viewable shortly also through the existing 'My Account' function.</p>	<p>Head of Customer Service (Corporate)</p>

council staff, Councillors and the public. During the design stages, customer/user testing will inform layout, usability and subsequent promotional activity.

The new CRM/digital platform will be built around the citizen account function.

Bulky collections and pest control are priorities areas to migrate onto 'My Account' but are dependent on the acquisition and implementation of a new integrated payment solution.

The CRM RFI (request for information) has been issued to suppliers with the view to the Council having selected a supplier by August 2015.

Since the previous update, e-billing services have been made available online through the existing 'My Account' offer – this currently operates separately to the CRM system. In addition, customers are now able to download/print their own Refuse calendars through the corporate website.

Microsoft Dynamics has been selected and procured as the new Customer Engagement Platform, replacing the existing CRM system. An implementation partner, Pythagoras was also selected. The Digital Transformation Programme was established in November 2015 and Phase '0' of the Customer Engagement Platform has begun in earnest.

Phase 0 provides 'as is' functionality of the existing CRM system along with some initial operational enhancements which are likely to provide some efficiencies. Phase 0 will be completed during March 2016.

Phase 1 of the Customer Engagement Platform starting in April will focus on the transactional capability of the corporate website and citizen account function – this is currently in the design phase.

Recommendation 4		
To ensure that all systems procured in the channel shift are future-proof. This includes ensuring the ContactPortal is updated regularly and system suppliers can be changed should the leading supplier of a service change whilst not requiring anything extra from the customer.		
Comment	Timescale/progress so far	Officer Responsible
Accept. This CRM procurement process will cater for this recommendation.	As above, the RFI for the new CRM solution is currently out to suppliers. <i>This continues to be considered as part of building the new Microsoft Dynamics system – ensuring anything that is build is readily maintained, updated or superseded within the system.</i>	Head of ICT (Corporate)

Recommendation 5		
To endorse the role of the Customer Services team on the Civic Centre concourse in guiding customers through the digital channels on tablets and PCs.		
Comment	Timescale/progress so far	Officer Responsible
Accept. The 'Floor walkers' will become more critical following the implementation of the redesign plans for the Civic Centre Ground Floor in the FutureSpace programme.	There are currently 4 PCs on the Ground Floor, two of which are locked down to specific web content. Floor Walkers are also provided with tablets in order that they can demonstrate to customers where information may be located online readily. Specialised web training has been developed and is to be rolled out to frontline staff in June/July to assist them in the language they use to explain/guide customers through web content etc. <i>Training material has been provided to Floor Walkers and also employees at Community Hubs within libraries who have begun to support users with a blue badge 'check and send' service.</i> <i>This is to be further expanded across the department through the</i>	Operations Manager, Customer Service (Corporate)

	<p><i>delivery of training in respect of the new Customer Engagement Platform and the future capabilities that will be available to customers.</i></p> <p><i>Further training needs will be identified around the new layout of the Ground Floor of the Civic Centre as building work begins later this year.</i></p>	
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Recommendation 6 To ensure customer satisfaction is monitored regularly and changes are made based on the feedback received.		
Comment	Timescale/progress so far	Officer Responsible
Accept. This now forms part of Customer Services KPIs reported to the Policy team.	Three questions have been agreed to ask customers across phone/face to face (receptions) and web. Customer satisfaction will be collected monthly but reported annually on this inaugural year of reporting. <i>This data is being collected across all channels with the Customer Services team putting a greater emphasis on collecting as many responses as possible.</i>	Head of Customer Service (Corporate)

Recommendation 7 To illustrate the positive work of the Channel Shift and Customer Services teams by ensuring all compliments received are publicised.		
Comment	Timescale/progress so far	Officer Responsible
Accept. All customer feedback should be welcomed, recorded and evaluated in accordance with corporate timescales.	The Corporate Complaints team within Customer Service have rebranded to be the 'Customer Feedback' team from March 2015. The web content, print media and telephone system have been updated to reflect this change. This is with the view to encouraging more compliments to be submitted . Equally colleagues have been	Complaints Manager, Customer Services (Corporate)

encouraged to pass on compliments for corporate logging through City People, Core Brief etc.

Within Customer Service compliments are also logged in our newsletter and on our success board.

The corporate communication team is copied into any compliments specifically received from the Public in order that they can arrange any appropriate publicity on relevant channels.

The above actions continue to take place. In addition, the Customer Services team was accredited with Investors in People Gold in December 2015.

A communication plan is now also in place for internal and external audiences around the Customer Services Transformation Programme, channel shift and operational Customer Services news.

Recommendation 8

To use SMS messaging as a form of contact with customers in confirmation of services booked and reminders of booked appointments or forthcoming renewals. This should be included in the procurement of a CRM Solution.

Comment	Timescale/progress so far	Officer Responsible
<p>Accept. SMS technology is recognised to be a preferable means of confirmation/reminders for 'top tasks' completed by customers.</p> <p>Councillor Johnson, Cabinet Member for Resources, is keen on the use of text messaging to confirm appointments.</p>	<p>The existing Essendex supplier has been utilised to issue confirmation and reminder SMS messages for the tip permits online process. It is also to be used from May 2015 by the Blue Badge team to provide customers with status updates/requests for information, evidence etc.</p> <p><i>The development of SMS for the Blue Badge team is currently still in development as resources have been focussed on developing and promoting the 'check and send' service provided by our libraries and community hubs. This service launched September 2015.</i></p> <p>The new CRM system will further automate the use of SMS technology and this is reflected in the RFI issued to prospective suppliers.</p>	<p>Channel Shift Manager (Corporate)</p>