



**Policy, Finance and  
Development  
Committee**

**Tuesday, 02 February  
2016**

**Matter for Information**

**Title: Customer Services Transformation**

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## **1. Introduction**

This report provides an update for Members on the progress of the Customer Service Transformation programme since the opening of the Council's new Customer Service Centre at 40 Bell Street, Wigston.

## **2. Recommendations**

That Members note the information provided within the report.

## **3. Information**

**3.1.** In order to meet the Council priorities of protecting front line services and delivering efficiency savings to meet continuing budget cuts it has been necessary for the Council to continuously review its services, organisational structure, processes and culture. One major area that was identified in 2014 in this respect was Customer Services and the way that the Council greets, deals with, assists and otherwise involves itself with members of the public as well as the internal processing of information amongst its staff.

**3.2.** Phase One of the Customer Services Transformation project saw the successful opening of the new Customer Services Centre at 40 Bell Street, Wigston on 12 October 2015.

### **3.3. Progress to Date**

In the initial 11 weeks of operation (12 Oct – 31 Dec 2015) the new Centre has dealt with:

- Face to Face visitors, 4,800; and
- Telephone callers, 7,000.

With the IT investment, detailed statistics can be produced and since the opening, the statistical information demonstrates that the change in location to a town centre has increased face to face contact significantly. The statistics show that by December there was a 40% increase in full enquiries and 66% increase in quick enquiries.

The service has also implemented a totally electronic method of referring enquiries to 15 other services in the Council. The use of this DASH (dashboard) system has allowed measurement of the enquiries both dealt with by Customer Services and referred back to these Service Areas.

**3.4. Phase 1 of the project consisted of the following deliverables:**

- Brand new Customer Services Centre open to the public:-
  - 1 Meet and Greet desk;
  - 3 Self Service PCs;
  - 3 Face to Face desks for Customers to speak to staff;
  - 2 Private interview rooms;
  - 1 Payment kiosk (to take cash and card payments);
  - 10 desk Telephone Call Centre; and
  - 1 “Hot Desk” room.
- Saturday morning opening;
- Late night Wednesday opening; and
- New telephone call centre – supported by a CRM (Customer Relationship Management) system supplied by Firmstep & intelligent call routing / queuing system supplied by Lloyds Telecom.
- The recruitment and training of:-
  - 1 Customer Services Supervisor post;
  - 8 new Technical Officer posts (1 more currently undergoing training);
  - 6 Public Liaison Officer posts (2 more currently undergoing training).
- The development of:-
  - 145 electronic forms and processes; and
  - 139 Frequently Asked Questions (FAQs) to assist in service delivery.

**3.5. The trial of late night Wednesday opening demonstrated that there was little demand with very low footfall. In view of this, with the little value to residents and the costs of operating, late night Wednesday opening ceased on 6 January 2016.**

**3.6. There is provision within the Centre for Partners to hold surgeries. The Police, Women’s Aid, Money Advice. In addition, the Citizen’s Advice Bureau and Helping Hands are between them providing voluntary advice sessions on Monday – Thursdays and in Oadby Library, fortnightly, on Fridays.**

**3.6. The second phase of the transformation project to commence shortly will be to deliver**

- Online forms for customers to use in place of calling or visiting the Customer Service Centre;
- The ability to pay for services in the same form as requesting that service (online);
- A My Account facility to allow Customers to check balances and make adjustments to their details; and
- Integration with a number of back office systems to remove “double keying” operations and unnecessary phone calls, visits or correspondence with the Council. Not only improving the customer experience, but reducing wasteful use of Council resources.

The scale and timing of Phase 2 is currently being finalised, as previous experience has indicated the timescale needs to match both the scale of what is being asked and the resources available.

### **Resource Requirements**

There are 3 elements to resource requirements

- Additional Software Licences / Implementation Services
- External Professional Assistance
- Internal Staffing

### **Additional Software Licences / Implementation Services**

The main provider of CRM software (Firmstep Ltd) have a contract to provide all of the necessary software and services for Phase 2 relating to their part of the project. As part of the project additional licences have been purchased for the Environmental Health (IDOX Uniform) for a 12 month period (from July 2015) to allow Customer Services use of the system, as well as additional licences for the Council Tax / Benefits system (Capita Academy).

The funding for integrating services into the Environmental Health system (IDOX Uniform) is funded by the TCA Partnership and should mean the additional temporary licences (renewable in June 2016) will not be required. However it should be noted that there is a risk that these licenses may need to be renewed if the TCA fails to deliver all the expected benefits in time. The annual cost of the additional licences is £2,800.

In view of the remaining project resources, the envisaged My Account function will be implemented without full integration to the Revenues/Benefits and Housing systems. This will still allow customers to check overnight balances.

### **External Professional Assistance**

The project to date has benefited from specialist ICT Project Management provided by SOCITM Advisory Ltd. This expertise has been vital in providing skills and capacity to develop forms and processes for the CRM and to manage the various suppliers of services, as well as the internal resources.

A further 32 days of Professional ICT Project Management have been sourced to support this process until the end of March 2016.

Our CRM suppliers, FIRMSTEP Ltd have indicated there is some doubt they can deliver the remaining work they are required to deliver prior to the end of March 2016. Therefore there is a possibility that a small number of additional days of Professional ICT Project Management resource may be required.

### **Internal Staffing**

Whilst there is no direct cost involved to Phase 2 implementation, the pace and scope of implementation needs reflect the capacity of full time roles to take on the additional work to support phase 2. This is particularly true now the Centre is open and the number of visitors and callers is high. Realistically the backfilling of posts is unlikely to accomplish a good result (as the time taken to train the resource will take too much out of project time), so the only option left is to extend timescales / reduce scope. As a minimum the project will require one working day per week for each of the following roles;

- Welfare and Taxation Manager
- Customer Services Team Leader

- Customer Services Supervisor

## Scope and timescales for Phase 2

The project team have reviewed the 145 forms and processes developed and identified approximately 50 to be delivered to the public. In addition there would be the forms relating to both Revenues/Benefits and Housing integrations (perhaps another 10 processes).

Current estimation is for implementation to take by the end of March 2016, as this coincides with the planned ending of the TCA Partnership project and envisaged ending of the external support from SOCITM Advisory Ltd. Although as previously indicated this is now dependent on the resource available from our CRM supplier FIRMSTEP.

## Finance Requirements

Supplier / Item	Phase 2 Cost	Ongoing requirement
IDOX Uniform Licences (provisional)	Already Paid	£2,800
<b>TOTALS</b>	<b>£0.00</b>	<b>£ 2,800</b>

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Implications	
Financial	There is budgetary provision for the customer services transformation.
Legal	No significant implications.
Risk	CR1 - Decreasing financial resources. CR4 - Reputation damage.
Equalities	No significant implications.