

# Report to Scrutiny Commission

Neighbourhood Services & Community  
Involvement

Date of Commission meeting: 22 March 2017

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## **Channel shift programme update**

Report of the Director of Delivery, Communications and  
Political Governance

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Leicester  
City Council

**Useful Information:**

- Ward(s) affected: All
- Report author: Miranda Cannon, Director DCPG
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**1. Summary**

The purpose of this report is to update the Neighbourhood Services and Community Involvement Scrutiny Commission on the channel shift programme covering specifically:

- Background and context for the programme
- Future programme management and delivery
- Progress in relation to customer relationship management (CRM) system
- Self-service offer in neighbourhoods
- Channel shift across the Council

**2. Recommendation(s) to scrutiny**

The Neighbourhood Services and Community Involvement Scrutiny Commission are asked to review and comment on the report and to identify any issues arising from the work of the Task Group which may be appropriate for consideration as part of the channel shift programme.

**3. Main report****3.1 Background and context**

As previously outlined the vision for customer access is a one council approach 'One Council, One contact' delivered through :

- One Contact Centre and digital self service locations
- One golden contact number
- One customer (service) website portal

In April 2016 the Executive approved the investment of £2m from the Corporate Resources and Support Department reserve to fund capital investment for five years and a dedicated resource to deliver a channel shift programme.

The aim of the programme is to achieve cost reductions in overall customer contact, to focus on achieving on-line as the default and preferred channel of choice for our customers, and improving customer experience.

Objectives are:

- to put in place the right underpinning technology (customer relationship management (CRM) system);
- streamline customer contact routes into a single face to face location at Granby Street supported by self-service facilities in localities;
- introduce a single phone number by triaging all Council customer contact (numbers) through the contact centre;
- for all transactions to be on-line as soon as possible and hosted under one umbrella site - MyAccount.
- underpinning all on-line contact should be end to end processes which are automated and linked with back office systems.

The channel shift programme is a work-stream within the wider Using Buildings Better programme. The reason for this being that it will help us in achieving a consolidation of physical customer access points by enabling customers to transact with us efficiently and effectively on-line and via self-serve facilities at multi-service centres.

### **3.2 Future programme management and delivery**

Caroline Jackson has stepped down from managing the programme due to the wider demands of her day to day head of service role. There are two senior project managers (Sarah Moore and Tom Shardlow) who are reporting for an interim period to Director of Delivery Communications and Political Governance. The intention is to seek an experienced Programme Manager who going forward can manage and drive the programme forward. There is a team of Business Analysts and Project Officers in place reporting to Sarah and Tom for delivery of the programme.

This is an appropriate time to take stock of the programme. The focus to date has been on procuring and implementing the underpinning technology, namely the customer relationship management (CRM) system (see section 3.3), consolidating face to face customer services and establishing appropriate self-service facilities for customers at Granby Street and out in localities (see section 3.4) and there has been work on specific channel shift projects (see section 3.5) but more as opportunities present rather than as part of a wider planned programme.

In order to take stock and establish future priorities and a clear programme of work for the next two years, there is a need to capture as fully as possible customer contact outside of Customer Services. Currently the data that is held about customer contact centrally, relates to those services where contact is managed via Customer Services including the customer service centre at Granby Street, via MyAccount and by the Customer Services Line. There is still a significant amount of customer contact outside of this which needs to be captured in terms of the focus going forward. Work is therefore underway to capture this and to establish the future programme which will be reported to scrutiny as it develops.

It is critical we give momentum and drive to shifting activity on-line in order to both support realisation and savings and because we are generally behind many other Councils in our ability to offer a comprehensive and efficient on-line offer to our customers.

### **3.3 Progress in relation to the Customer relationship management (CRM) system**

In support of the channel shift agenda, the authority procured and implemented a new customer relationship management (CRM) system.

The Council's new CRM system went live on 2nd March 2016. The system is much more advanced than the previous system and has a number of areas of functionality. In particular the first two key features to be delivered were the Achieve Service which is the internal module of the CRM system used by Customer Services staff to log customer contact requests, and the MyAccount platform. This is the self-service platform of the CRM product for customers to interact with the Council which went live in October 2016. The portal is accessible at [leicester.gov.uk/myaccount](http://leicester.gov.uk/myaccount) or through the link on the corporate homepage of the Council website.

The very limited functionality of the previous Belfast CRM system mean that there is very little data to inform comparisons between the old and new system in terms of contact and transaction volumes. Going forward we will be better able to track and report on trends over time in the type and nature of customer contact which will support an assessment of the impact we are having in terms of channel shift.

#### **Achieve Service (internal CRM platform):**

- Achieve Service went live on **02/03/2016**. **110,916** transactions have been made using the **102** forms that cover **19** of the council's service areas.
- Nearly **80%** of contact has been made through the Customer Service Line (CSL), or **103,373** transactions.
- Waste Management is the most popular service enquired about, with **60,915** enquiries made during the reporting period.  
*Reporting period (02/03/2016 – 28/02/2017)*

#### **My Account (Self):**

- My Account went live on **4/10/2016** and currently (as at 07/03/17) has **10,125** registered users.
- During this initial period it was soft launched without a formal marketing campaign. A more formal marketing campaign for MyAccount commenced on 28 February.
- Customers can engage with **15** of the council's service areas using the **48** forms that are available. **18,669** transactions have been made so-far through the My Account platform.
- Customers are invited to provide feedback on the form that they have submitted. Feedback is measured in "stars" (1 – 5 stars). The average rating given by customers on My Account is **4 out of 5 stars (3.79)**. Customers often compliment My Account on its convenience and ease of use.
- Currently, 40 out of 48 transactions that can be completed through My Account are submitted directly to the business area, without the need for human

intervention. This accounted for 3,526 out of 18,669 transactions made, or 19% overall – previously, this contact would have been handled via Customer Services. The 8 areas that are not integrated are as follows and we are working on the high volume areas particularly orange bags and housing:

- Request a bulky waste collection
- Request or report a problem with orange bags
- Request a new housing repair
- Report a problem with your bins
- Make a general enquiry
- Report a missed collection
- Request an update on an outstanding repair
- FAQ - Help using My Account

### ***The Top Five Transactions Made on My Account***

Form Name	Number of Submissions
Request or report a problem with orange bags	6046
Request a bulky waste collection	5990
Request a new housing repair	1059
Report a problem with your bins	678
Request an appointment to register a birth	636

*Reporting period (04/10/2016 – 28/02/2017)*

- Transactions that are high in volume and considered ‘simple’ should be channel shifted when given the opportunity. We have already seen significant channel shift since go live (04/10/2016 – 28/02/2017).

### ***Channel Shift for High Volume Transactions***

Form Name	Number of Calls Received	Number requests made through My Account	% of transactions made through My Account
Request or report a problem with orange bags	694	6046	90%
Report a problem with your bins	1060	678	39%
Request a bulky waste collection	9883	5990	38%

**\*\* Data extracted for the period 04/10/2016 – 28/02/2017**

- Should customers not wish to register and create an account, there is an option to continue without an account and have access to the forms available in My Account and continue their transaction in that manner.
- Services that have had eforms created on the Achieve Service and MyAccount platform are listed in Appendix 1.

Within MyAccount the forms are designed to be intuitive to use and adapt as they are completed, only asking questions that are relevant to that enquiry. When the customer submits their enquiry they are sent an acknowledgement email and the enquiry is sent as directly as possible to the relevant business area. In addition to service requests, customers may also make comments, compliments and complaints using the “My feedback” feature.

For the user, the benefits of using My Account are:

- The ability to access council services 24 hours a day, seven days a week.
- No waiting in queues.
- Easy to use, intuitive processes.
- Instant email confirmation including a unique reference number.
- Ability to see account history and requests made.

For the Council, the benefits of My Account are:

- Reduced operational costs.
- Solid reporting ability.
- Useful customer insight.
- Holistic view of customer contact.
- Rationalisation of back office information storage, back office databases and processes.

A user group consisting of service users, corporate service users and partner organisations has been set up to help evaluate ease of use, appropriate language, etc. of new products both on-line and other forms of communication. This group tested the MyAccount offer prior to ‘go live’, their feedback was very positive and their involvement is continuing in the channel shift programme.

### **3.4 Face to face and self-service**

For the majority of our customers it is anticipated that they will self-serve on-line using their own mobile devices or computers, either on the move or in their own home. The Council has implemented free Wi-Fi access across the city centre and there is also free wi-fi available in our Libraries for registered library users, in our Leisure Centres and at the Customer Service Centre in Granby Street.

In addition there are public computers within Libraries which are connected to the internet. There are also dedicated self-service computers/customer service kiosks at Granby Street, Pork Pie Library and Community Centre, St Matthews Centre, New Parks Library and Beaumont Leys Library and they will be installed at Belgrave Library and Hamilton Library as part of the TNS North East implementation. These are specifically for undertaking on-line transactions. In addition these locations have Customer Service free phones. Suitable options for the remaining area of the city will be considered as part of the current Transforming Neighbourhood Services work in East/Central.

In relation to payment transactions, customers can make a range of payments on-line including via My Account. There are also other ways in which customers may self-serve for payments as follows:

- Self-serve payment kiosks are located at Granby Street Customer Services Centre and are being rolled out to the multi-service centres in conjunction with the TNS programme.

- Automated telephone payments can be made 24 hours a day, 7 days a week for council tax, business rates , housing (or garage) rents, customer accounts invoices, bus lane enforcement penalty charge notices, benefits overpayments
- Pay via Pingit which is a mobile app which has been recently introduced and which we are working on promoting as another payment option.

For a range of transactions our customers are required to bring in Work is currently underway to develop simple self-scanning facilities at the Customer Service Centre and for roll out to the self-service facilities out in localities, along the lines of a simple tablet device as follows:



### **3.5 Channel shift across the Council**

As noted earlier a number of channel shift projects have been, and are being undertaken. However now that the fundamental building blocks of CRM and self-service are in place, this work now needs to move to a formal programme with real momentum and drive. In particular the focus cannot just be about putting the transaction on-line but the process that follows on from that initial customer contact needs to be automated wherever possible and linked to the relevant back office systems if we are to be efficient and realise savings.

The projects completed to date include:

- Payments on-line
- School admissions
- Appointments for registering births appointments
- Bereavement services
- Initial hard stops in telephony for areas such as pest control and parking fines and also to most payments
- Adult Social Care calls out of hours – migration from third party supplier

The current live projects are:

- Bus passes on-line
- Adult Social Care (ASC) telephony
- Information governance (eg FOI requests, subject access requests)
- Housing options
- Housing repairs online
- Housing rents in MyAccount
- Orange bag & wheeled bin requests integration with Biffa's systems
- Automated processing of council tax changes
- Taxi licensing on-line including online testing
- Telephony 'hard stops'

### **3.6 Next steps**

The next steps as indicated are to capture a wider picture of customer contact and to develop a clearly prioritised programme of work for the next two years for agreement by the Executive. The target is to do this by May. The programme can also be shared with Scrutiny once prepared.

## **4. Financial, legal and other implications**

### 4.1 Financial implications

The aim of the channel shift programme is to achieve cost reductions in overall customer contact, to focus on achieving on-line as the default and preferred channel of choice for our customers, and improving customer experience.

Colin Sharpe, Head of Finance (37 4081)

### 4.2 Legal implications

There are no implications arising directly from the recommendations of this report. It is noted that legal services are instructed and involved in individual projects as they evolve in order to advise on any service/goods contract termination or procurement and to provide any advice on related issues such as best value guidance and consultation.

Emma Horton, Head of Law (Commercial, Property & Planning) (37 1426)



#### 4.3. Climate Change implications

To the extent that it reduces unnecessary customer car and bus trips to the Contact Centre or other facilities, Channel Shift will reduce city-wide carbon emissions from transport. Transport accounts for just over 20% of the total. The intended shift of contacts/transactions which are already on-line to a more/fully automated system is likely to have only limited carbon reduction implications. It might contribute to further reductions in the Council's own carbon footprint if automation leads to fewer staff required – and a resulting reduction in office accommodation

Duncan Bell, Senior Environmental Consultant (37 2294)

#### 4.4 Equality Implications

The aim of the programme is to enable customers to transact with the council more efficiently and effectively online and via self service facilities at multi service centres. The on-line services provide an extra channel for customers to make an enquiry at a time and place that suits them. It will be easier for some disabled people who already have access to computers and specialist assistive technologies to access our services via the internet, It can give them the independence to pay their own bills and find information. There is also an opportunity to improve internet use for people who are currently digitally excluded.

The main issues that will need to be continually addressed through the lifespan of the Channel Shift (and Customer Access) transformation programme/project are the potential barriers people with the protected characteristics of age, disability and race may have/experience in accessing council information online either at home or at a customer service centre: availability of assistive technology that enables disabled people to understand this information; support that enables people with poor English language skills to understand this information – either because of literacy levels or because they do not read or speak English; or support for those who are not confident in using or do not have ready access to online technology.

The above equalities implications for each new initiative should be considered afresh to ensure that maximum access is afforded to all potential service users who would benefit from these channel shift actions.

Surinder Singh, Equalities Officer (37 4148)

#### **5. Background information and other papers:**

None

#### **6. Summary of appendices:**

Appendix 1 – Forms on the CRM Achieve Service and on MyAccount