

Cabinet – 4 September 2024

Customer Strategy

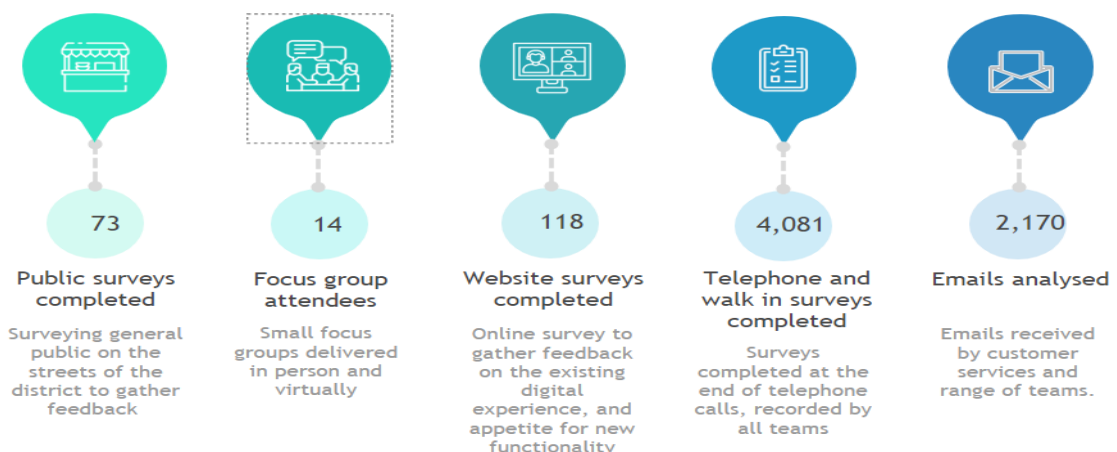
Purpose	For decision
Classification	Public
Executive Summary	<p>This strategy sets out the Council’s vision and commitment to achieve the best possible experience for our customers, whoever they are and whenever they deal with us.</p> <p>Through consultation we recognise that many of our customers want a more immediate service and expect to be able to contact us when it is convenient for them. Although we will adopt a digital by design approach to utilise technology to encourage self-service, access to services will still be available via telephone and face to face to support our vulnerable customers to ensure nobody is excluded.</p> <p>The Customer Strategy will embed a culture of the customer being at the heart of what we do to ensure the customer receives a professional and modern experience when interacting with the Council.</p>
Recommendation	That Cabinet recommend that Council approve the Customer Strategy
Reasons for recommendation	The Customer Strategy supports our commitment of putting the customer at the heart of what we do by understanding our customers’ needs and providing efficient, modern, and professional services to our customers.
Wards	All
Portfolio Holder	Councillor Jeremy Heron – Finance & Corporate
Strategic Director	Alan Bethune – Strategic Director Corporate Resources and Transformation
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Introduction and background

1. The recently approved Corporate Plan sets our vision of “Investing in our people and services to meet customer needs” and “putting the customer at the heart of what we do,” with the focus being on our customers to ensure we provide “easy to use services and efficient working practices and processes”. Underpinning the Corporate Plan is the Transformation Strategy, Future New Forest (Transforming tomorrow, together) which identifies four challenges facing the Council: financial, capacity, modernising services, and climate. The strategy specifies four themes, of which Customer and Digital is one. The Customer and Digital theme is about how we redesign our services to improve the customer experience and make better use of technology. There are three objectives, these are:
 1. Our customers will be at the heart of our digital-by-design approach
 2. We will use data and insight to plan services, manage performance and direct our focus for transformation
 3. We will have the right systems, processes, and devices to ensure work can be done in the right place, right time and in the most efficient way
2. The Customer Strategy sets out how we will provide services to our customers, whoever they are and however they want to interact with us. The Customer Strategy supports both our Corporate Plan and the Transformation Strategy and our commitment to our customers by ensuring the customer is central to our thinking when reviewing process, utilising technology to modernise services to be more efficient, releasing capacity and reducing our environmental impacts.

Customer Insight

3. During 2023 we worked with Ignite consultancy to gather customer insight to understand our customers and to support shaping the strategy. The following activities were undertaken.



4. From the customer insight gathered there were some key themes, notably:
 - customers want assurance that their contact is being dealt with along with clear timescales
 - customers want to be able provide information once
 - 33% of the emails received were follow-up
 - 66% of customers want to do things for themselves online
 - there should be a range of access channels – including non-digital for those customers unable to interact online
5. Customers also stated that:
 - human contact gives us confidence
 - services are not always joined up
 - issues are usually resolved quickly when calling
 - staff are polite and professional
 - their feedback is not always listened to
 - they could not find, or do what they needed to do online, causing them to call
6. All of the insight gathered was considered when developing the Customer Strategy.

Consultation with staff and partners

7. Meetings were held with Change Champions who represented a range of teams from across the council. The group discussed the insight and research and current processes and procedures, alongside potential initiatives and technological enhancements which could be utilised to improve customer service. The strategy has also been discussed in Chief Executive staff briefings and shared with the Executive Management Team, the Leadership Team, and with teams providing customer services.
8. The draft strategy has been shared with Town and Parishes' where they provide an Information service on our behalf, residents who attended the focus groups in 2023, Tenant Involvement Group, and Citizens Advice New Forest. Feedback received from this consultation was reviewed and the strategy amended where appropriate.

Customer outcomes and principles

9. From the insight and research 4 key customer outcomes were considered which underpin the Customer Strategy, these are summarised as:

Understand	understanding the needs of our customers
Experience	providing customers with a positive experience
Access	providing a range of access channels for customers
Trust	keeping data secure and doing what we say

10. To achieve these outcomes four key principles have been considered, these are:

1	We will put customers at the heart of what we do
2	We will provide our customers with a consistent experience through all interactions with us
3	We will utilise technology to meet customer needs
4	We will use data to shape and improve service delivery

11. These outcomes and principles will be embedded into our culture across the Council, and we will ensure that when we are designing processes and procedures and implementing technology, we will do so with customer in mind to ensure we meet our customers' needs. The strategy supports a two-way relationship with our customers, listening to feedback and working together to create efficient and accessible services and getting things right first time.
12. Within the strategy there is a Channel Strategy to support our digital by design approach as we know that some customers want to do things for themselves, have easy to use access to services and reduce the use of email. The strategy is clear to ensure that those customers not able to interact digitally will not be excluded.

Customer promise and standards

13. The Change Champions group developed a *Customer Promise* which defines the way that all staff across the council will deal with our customers and supports the delivery of the customer outcomes and principles. This ensures we listen and learn, provide a positive experience, be open and honest and take responsibility. The promise also defines how we want customers to interact with us.
14. The group have also developed corporate standards to support providing a consistent customer service across the council.

15. Managers will endorse and promote the promise and standards to ensure they are embedded and adhered too.

Action plan and implementation

16. The Customer Strategy is ambitious and within the strategy is an Action Plan which provides details on the range of activities, along with timescales, to be undertaken. The Action Plan has been considered to ensure alignment with the ICT Digital Strategy and workplan. There will be some *quick wins* and activities to embed the customer centric culture, but due to timescales for procurement, installing, testing and implementation, some changes will not occur straight away, such as a new Customer Relationship Manager.
17. Using resources from ICT, Transformation, Customer Services, and key Officers from across the council, working groups will be established to deliver the activities in the Action Plan, and staff will be updated through various communication channels, including Monthly Meet and staff briefings, to ensure engagement.

Resources and Transformation Overview and Scrutiny Panel comments

18. The Panel fully support the Customer Strategy and recognise the need to invest and utilise technology to support those customers wanting to do more online for themselves. The Panel were reassured of the commitment to ensure that nobody is excluded from our services and access to services by telephone and face to face would continue, especially to support our most vulnerable residents.

Corporate plan priorities

19. The Customer Strategy supports our Future New Forest transformation programme and our Corporate Plan by putting the customers at the heart of what we do. The Customer Strategy is aligned to our commitment to investing in people and services and using insight and data to develop efficient working practices and processes, including easy to use digital services, to meet customer needs. Access to services by telephone and face to face will remain available to ensure we support our vulnerable customers.

Options appraisal

20. The Customer Strategy is a key strand to support and underpin our Transformation programme and has been developed using data, customer insight and in consultation with staff and partners.

Financial and resource implications

21. There are financial implications with the investment in modern technology that will support the customer strategy. These indicative

costings, which are significant, are included in the Transformation Business Case. Understanding our customers, reducing avoidable contact, utilising technology, and working more efficiently will provide opportunities to reduce costs and/or release capacity.

Legal implications

22. There are no legal implications arising directly from this report.

Risk assessment

23. There are no risk assessments required, however each project will have a detailed project plan, scope, and governance which will include an analysis of associated risks which will be regularly discussed and reviewed.

Environmental / Climate and nature implications

24. The customer strategy supports initiatives which promote positive environmental impacts, such as a reduction in paper usage.

Equalities implications

25. The customer strategy will ensure we understand the various channels different groups need to access our services and recognises that some customers are unable to access online services and is committed to supporting our vulnerable customers so that nobody is excluded. This includes providing access via telephone and in person and considering customer needs when designing services.

Crime and disorder implications

26. There are no crime and disorder implications arising directly from this report.

Data protection / Information governance / ICT implications

27. The Customer Strategy is aligned to the ICT work plan and officers will work closely with ICT on any technological implementations, for example a new Customer Relationship Management system, and consider any data protection implications, including reviewing and updating privacy notices.

Conclusion

28. The Customer Strategy sets out our vision and commitment to achieve the best possible experience for our customers and ensure there is a customer centric culture across the Council. It is ambitious and will take time to achieve. Although the strategy has utilising and enhancing technology to enable customers to self-service as an objective, we are committed to ensure nobody is excluded and that we still support vulnerable customers through telephone and face to

face. The strategy applies to all council employees and having the customer at the heart of what we do will ensure processes are designed to meet their needs. This strategy supports the wider Transformation Strategy and Corporate Plan.

Appendices

Appendix 1 – Customer Strategy

Background Papers:

Minutes of the Resources and Transformation Overview and Scrutiny Panel meeting of 25 July 2024