

Item No. 10.	Classification: Open	Date: 21 March 2017	Meeting Name: Cabinet
Report title:		Customer Access Strategy Refresh	
Ward(s) or groups affected:		All	
Cabinet Member:		Councillor Fiona Colley, Finance, Modernisation and Performance	

FOREWORD - COUNCILLOR FIONA COLLEY, CABINET MEMBER FOR FINANCE, MODERNISATION AND PERFORMANCE

The progress made by Southwark since its first Customer Access Strategy was published in November 2012 is significant. In barely four years the council has transformed its customer access and continues to do so at an impressive rate.

We listened to our customers who expressed dissatisfaction with our outsourced services, including the call centre, One Stop Shops, website and Revenues and Benefits service. We brought these services back into direct management of the council in 2013 and customer satisfaction has improved and the council has also realised significant savings.

In the previous strategy, we recognised that “the spread of the internet and mobile technology has presented new opportunities for delivering services more effectively and at a lower cost”. Today 80% of adults in the UK have a smart phone and widespread online access has changed customer expectations and enabled customers to access services 24 hours a day, seven days a week.

In other industries, we take for granted and expect services to be delivered online and be able to access them whenever we want; whether we are booking a holiday, using a comparison site to find a best value deal, or to do our shopping. These have become a way of life and we live in a world now where technology allows us to keep in touch, be more connected and receive updates more frequently than ever - and we need to make sure our services reflect this.

Since we launched our online platform, My Southwark, it has grown to over 100,000 registered accounts. Whilst this platform offers a great variety of online services, we will continue to consult widely on our plans and changes to services, to ensure the needs of local people and businesses are understood and customer feedback is used to help shape future priorities.

We remain committed to delivering excellent customer services for all of our customers and will ensure that no one is left behind. For instance we aim to have 5,000 ICT training places in our libraries in 2017 as part of our digital inclusion plans.

This requires us to think differently about the way we provide services. To develop and encourage self-service, work better with our partners to save money and join up services so that customers can access all of their information in one place.

This strategy is the latest of a number of new and refreshed strategies which together, aim to deliver improved IT and digital services and an improved customer experience for all. The customer access strategy, along with the complementary digital and modernisation strategies, set out our approach to these challenges over the next four years.

Our vision for the strategy is clear. We aim to deliver modern, digital customer services that provide easy access and value for money whilst placing our customers at the heart of everything we do.

RECOMMENDATIONS

1. That cabinet note and endorse the refreshed customer access strategy contained within Appendix 1 of the report.
2. That cabinet notes the equality and health analysis as per Appendix 2.
3. That cabinet notes that progress and delivery of the refreshed customer access strategy will be reported through an action plan based on the commitments set out in the strategy and at regular annual reporting on the council plan itself.

BACKGROUND INFORMATION

4. Southwark Council published its first Customer Access Strategy in November 2012. That strategy set out to transform how our customer services operated and took significant steps towards modernising how customers access services in Southwark.
5. Notably, customer services functions, including the telephone contact centre were brought back in house in 2013 following termination of the outsourced contract, delivering £4.5m in savings to date. In addition, customer satisfaction with customer services has increased year on year.
6. The number of registered My Southwark personalized account holders continues to grow and has now passed the 100,000 mark. This established the beginning of an online hub for customer services, where customers can, for example, find information about their local libraries or view their rent or service charge account if they are a council tenant or homeowner.
7. In the years since the 2012 strategy was published, technology has continued to infiltrate people's lives. A UK survey conducted by Deloitte in 2016 showed that over 80% of adults have a touch screen smart phone. There has been an ongoing channel shift with online services such as shopping and banking resulting in changing customer expectations.
8. New technologies, such as smart phones and tablets, have enabled customers to access information and carry out transactions at a time and place that is convenient to them.
9. The refreshed 2017 strategy analyses these trends and focuses on this "channel shift" with the intention to continue to grow and improve the council's online services. In order to successfully achieve this and encourage customers to access services online instead of relying on traditional services such as the service points and contact centre, the council must deliver an excellent user experience. In

addition to improving the customer experience, the council's channel shift ambitions will deliver efficiency savings.

10. The strategy therefore sets out a vision for future service improvements based on a five point plan taken from a number of themes emerging from the strategy.
 - The first of these is **Transformation**, which includes proposals for the future role of the contact centre, the website and digital alternatives.
 - The second theme is **Understanding**, which provides details and commitments about how we plan to consult with and listen to our customers to inform our decision making processes.
 - Thirdly, **Enhancement**, which recognises the progress made in the previous strategy and looks to further build on these. In particular, the My Southwark refresh and improvements to our services for businesses.
 - Fourth is **Awareness**, which explores how we will inform our customers of the services available to them as part of our plans for channel shift and to encourage them to adopt self-serve. This refers specifically to our recent procurement of GovDelivery which will assist us with sending out targeted electronic communications through My Southwark and other mediums.
 - The final and equally important theme is **Inclusion**. This sets out our commitments to ensure all of our customers can easily access information and have all of their needs considered. We will ensure that, in the event of emergencies and in order to meet the needs of our vulnerable customers, a telephone service is available.
11. The strategy therefore aims to transform how the council works in order to better serve our customers. The 2017 refresh sets out a new four year strategy that focuses on channel shift, customer experience and raising the awareness of available services to meet business needs and our strategic vision.
12. This refreshed strategy is closely linked with the Modernisation Programme and the Digital Strategy. It ties in with the council's fairer future key principles and is informed by the latest version of the 2014-2018 Council Action Plan.
13. The new strategy also continues to meet the requirements of Equality Duty 2010, which requires public bodies to publish relevant, proportionate information annually demonstrating their compliance with the Equality Duty.

KEY ISSUES FOR CONSIDERATION

14. The Customer Access Strategy Action Plan will be the corporate mechanism for coordinating and monitoring projects resulting from this strategy across the council as delivered by service areas.
15. Monitoring and evaluation metrics to measure the impact of the Customer Access Strategy on internal and external customers will be identified and implemented.
16. The Customer Experience division will provide support and expertise to enable services to design and implement service improvements. These improvements

will enable service areas to realise efficiencies and financial savings and improve customer experiences.

Policy implications

17. The customer access strategy supports our overall priority to be a council that is fit for the future, as set out in the refreshed council plan 2014-18. The progress and delivery of the strategy will be reported through an action plan based on the commitments set out in the strategy and at regular annual reporting on the council plan itself.

Community / equality impact statement

18. Analysis and ongoing evaluation of the equality impact is fundamental to the customer access strategy. The Equality and Health Impact assessment for the Digital Strategy is attached as Appendix 2.
19. The impact assessment is a living document and will be updated as more data and evidence is collated on the protected characteristics. It will be a requirement of all major projects established as a result of the strategy, to conduct impact analyses, as led by service areas, in order to mitigate any potential negative impacts of introducing changes.
20. As the Strategy is far reaching across the entire organisation, for all major existing and future customer access projects, service areas will be required to carry out an impact assessment to fully understand how various parts of our communities will be affected by the introduction of redesigned services. Greater emphasis will be placed on those projects looking to phase out and close traditional engagement methods, the implications of such changes and the measures to be put in place to support the vulnerable in our communities to continue to access services.
21. A detailed trend analysis will take place from March 2017 onwards to monitor and assess any changes or impacts to protected characteristic groups over time.

Resource Implications

22. There are no specific implications arising from this report. Existing resources are already in place to meet the strategic aims. Any actions arising which have resource effects will be subject to separate decision-making process and reallocation within existing budget.

SUPPLEMENTARY ADVICE FROM OTHER OFFICERS

Director of Law & Democracy [NBC/20170220]

23. The Director of Law & Democracy notes the content of the report.
24. The report asks cabinet to note and endorse the strategy and to note the vision, objectives and deliverables contained in the strategy. This is in accordance with Part 3B of our constitution.
25. Cabinet are reminded of the PSED General Duty under section 149 of the Equality Act 2010 to have due regard to the need to:

- a. Eliminate discrimination, harassment, victimisation or other prohibited conduct;
 - b. Advance equality of opportunity between persons who share a relevant protected characteristic and those who do not share it;
 - c. Foster good relations between person who share a relevant protected characteristic and those who do not share it.
- 26. The relevant protected characteristics are age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Marriage and civil partnership are protected in relation to (a) only.
- 27. Paragraph 18 of the report advises that a documented equality analysis was carried out as part of the requirement to have due regard to the PSED General Duty in these recommendations. Cabinet must read the documented equality analysis (see background documents) and should satisfy itself that the PSED General Duty has been complied with when considering these recommendations.
- 28. The PSED General Duty is a continuing one; the report details in paragraph 21 that detailed trend analysis will take place from March 2017 onwards to monitor and assess any changes or impacts to protected characteristic groups over time.

Strategic Director of Finance and Governance (FC16/040)

- 29. The Strategic Director of Finance and Governance notes the recommendations in this report. Where the customer access strategy has financial implications, these will be managed within the existing agreed budgets for 2017-18 and subsequent years for the council's general fund and housing revenue account.

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
None.		

APPENDICES

No.	Title:
Appendices circulated separately	
Appendix 1	Customer Access Strategy Refresh
Appendix 2	Customer Access Strategy Refresh 2017: Equality and Health Analysis

AUDIT TRAIL

Cabinet Member	Councillor Fiona Colley, Cabinet Member for Finance, Modernisation and Performance		
Lead Officer	Gerri Scott, Strategic Director of Housing and Modernisation		
Report Author	Richard Selley, Director of Customer Experience		
Version	Final		
Dated	8 March 2017		
Key Decision?	Yes		
CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / CABINET MEMBER			
Officer Title		Comments Sought	Comments included
Director of Law & Democracy		Yes	Yes
Strategic Director of Finance and Governance		Yes	Yes
Cabinet Member		Yes	Yes
Date final report sent to Constitutional Team			8 March 2017