

Customer access strategy refresh

2017 to 2020





Foreword

This refreshed strategy sets out how, over the next four years, we aim to transform the way in which our customers access our services.

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. People and organisations too have adapted to take advantage of technological and communication advancements.

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 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.

Our commitment to providing strong customer service has not changed; however we are now working in an

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.

environment of increased demand for services and reduced resources. We know that an excellent user experience will be crucial to encourage customers to choose to use our online self serve facilities again and again.

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 selfservice, 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.



Arona Ily

Cllr Fiona Colley

Cabinet member for Finance, Modernisation and Performance

The customer access strategy

This strategy explains how we will provide access to our services.

The customer access strategy affects every service in the council. It takes into account the complexities and nuances of each service area, and the most appropriate, convenient and cost effective way to deliver these.

The objectives outlined in the strategy aim to provide both greater efficiency for the council, through better use of resources, and better service for residents, businesses, partners, students and visitors, through an improved customer experience.

Strategic principles

The Customer Access Strategy is central to ensuring that customers remain at the heart of everything we do. Our strategy supports and contributes to all five overarching fairer future key principles which are:

- Treating residents as if they were a valued member of our own family: we will deliver quality, accessible online services to all of our customers.
- Being open, honest and accountable: we will set challenging targets for the Customer Access Strategy and publish our performance results online.
- Spending money as if it were from our own pocket: we will continue to keep council tax low by delivering value for money across all our high quality services.
- Working for everyone to realise their own potential: we will deliver a council wide approach to provide the skills and opportunities for elderly and vulnerable people to easily access information, services and have their needs considered.
- Making Southwark a place to be proud of: transforming how we serve and enhancing the lives of people in our community so that no one is left behind.

The Customer Access Strategy is closely linked to the Modernisation Programme Strategy and the Digital Strategy.

These strategies focus on the workforce, workplace, IT and the approach to embracing digital technology.

In addition to the overarching fairer futures principles, we have identified five key objectives which underpin this strategy.

Five objectives

- 1. **Transformation** At the heart of this strategy is the development and growth of online services as we continue to see a reduction in face to face footfall and Contact Centre demand.
- 2. Understanding We will consult with our customers and use feedback to inform the service improvement process. We will continue to use mystery shopping to give us insight in to how our customers access services.
- 3. Enhancement We have already made great progress building our online, digital, customer access platforms. The next steps are to expand the number of services online and maintain and enhance the existing functions.
- 4. Awareness Progression of channel shift¹ with initiatives to increase awareness of digital resources available to customers.
- 5. **Inclusion** We will ensure all customers can easily access information and have their needs considered.



¹ Channel shift relates to customers moving from one method of contact, largely traditional, to another digital method and preferring to use it, not reverting back to previous behaviours.

Background and context

National context

Technological advancements are continuing at such a pace that it is essential for the council to refresh its strategic approach to the provision of customer access as new possibilities emerge and customer expectations change.

In 2016, 77% of adults bought goods or services online, up from 53% in 2008. In 2016, 89% of households in Great Britain (23.7 million) had internet access, an increase from 86% in 2015 and 57% in 2006. The number of adults using online banking has doubled since 2007 from 30% to 60% in 2016².

As peoples' habits change, so too does the way they expect to be able to access services. In 2012, 96% of smart phone users made standard voice calls at least every week, in 2016 this has dropped to 69%³.

Here are three examples to put the rate of change into context:

My Southwark

Southwark's main online platform for interacting with customers, My Southwark has now grown to have over 100,000 accounts since it was introduced in the first Customer Access Strategy in 2012.

Tablet devices

Four years ago only 16% of adults had ready access to a tablet device, now 63% of adults have ready access to one.

Smartphones

Nine years after the launch of the first touch screen device, four out of five UK adults now have a smartphone - equivalent to 37 million people.

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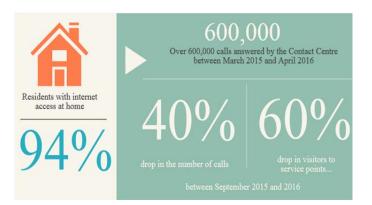
www.ons.gov.uk/peoplepopulationandcommunity/householdcharacterist ics/homeinternetandsocialmediausage/bulletins/internetaccesshousehol dsandindividuals/2016

³ Deloitte. Global mobile consumer survey. 2016

We have seen also that digital technology can help people to control their lives. Whether it is checking their latest bank account balance online whenever they need to, or seeing what documents they have submitted to support an application without having to phone to check. Technology has proven to be a great enabler to help vulnerable people, particularly those who are housebound, stay in touch with family and friends as well as access services.

In addition to these changes in behaviour, since 2010 Southwark Council has had to make £156m of budget savings, equivalent to a third of its budget. Despite being one of the most deprived areas of the country it has faced some of the largest reductions in government funding for local authorities.

Cuts to government grants and funding are expected to continue, so the strategy is driven by necessity to deliver savings whilst also aiming to offer better services to customers.



Local context

The local context also plays a role in the development of a new strategy. Southwark is a hugely diverse urban borough, which presents its own challenges and opportunities when delivering customer services.

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97% of Southwark's residents are internet users

> Almost 15% of the borough's population has a disability which limits their daily activities

Over 120 languages spoken in Southwark and in 11% of households nobody has English as a first language

> Over 15,000 businesses in Southwark

Only 8% of Southwark's population is aged 65 or older, compared with 11% in London and 17% in England

Southwark's population is predominantly a young population, 42% aged 20 to 39 years old compared with 35% in London and 27% in England

Our customers

Our customers are not only the residents of the borough; they also include visitors, students, businesses and partners.

Customers contact the council for a host of reasons, whether as a council tax or business rate payer or as a user of a specific service such as libraries, parking, waste and recycling, and schools.

Typically, these are simple and routine interactions that allow customers to complete transactions conveniently. Most customers only use a small proportion of the council's services and are unaware of the full range that they could benefit from each day.

In a small number of instances, intensive support may be required to help the individual "back on their feet". These services are more likely to be intensive, complex and targeted to the specific needs of the individual or family.



Residents

Southwark is an area of great diversity, with areas of affluence alongside more deprived ones. 48% of the borough's population are from a black minority ethnic (BME) background. The borough's residents have specific needs and preferences as to how they would wish to contact the council, which needs to be considered as part of this strategy.

Businesses

We are home to over 15,000 businesses and over a quarter of a million jobs. Our proximity to the huge markets of central London combined with our growing connectivity, strong cultural sector, unique attractions and iconic developments make this a highly visible and desirable location for business.

With strong representation in growth sectors such as business services, technology and creative industries,

Southwark is ideally placed to take a leading role in the city's economic expansion⁴.

Businesses look to base themselves in Southwark for a variety of reasons but some of the main requirements they look for are good connections both physically through transport and digitally for communications.

Visitors

Closely linked to the business sector are the visitors the borough receives. Because of the cultural attractions and retail facilities, the borough receives a huge number of visitors.

Education

In addition to the borough's schools there are several colleges offering a diverse range of higher education courses.

Southwark is also home to London South Bank University with its main campus in Elephant and Castle.

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20,00 followers News, information and updates 4,000 likes News, information and updates

⁴ Southwark Economic Wellbeing Strategy 2017-22 (Draft)

Vision

The vision sets out five key objectives which the strategy aims to address.

Transformation

We will reduce footfall to front facing services. We will do this by developing our services so that customers have an online self-serve option. This is the most cost effective service for Southwark to provide. This can only succeed if the user experience is better than what we already offer. Our target is to close the gaps in our services provided by the service points by 2018. However, we will continue to make sure that our most vulnerable customers have a form of appropriate access to the support they need.

The role of the Contact Centre

Since bringing the service back in-house in 2013, it has allowed us to better monitor customer satisfaction and the results have shown improvement and high performance. As a new performance indicator in 2014/15 there was 94% satisfaction with the service received at the call centre, which increased to 97% in the last year (2015/16).

As service users move to the online platform and our benefits service changes as Universal Credit establishes itself, the purpose of the Contact Centre will change too. We are aiming to reduce the amount of resources spent on the contact centre.

Technical support, particularly for My Southwark as it becomes more widely used, will form a larger part of the provision. The traditional role of the Contact Centre will change. Overall we will see the traditional service shrink in size as the online platforms continue to grow.



Closing the gaps covered by our service points

Channel shift relates to customers moving from one method of contact, largely traditional, to another digital method and preferring to use it, not reverting back to previous methods. As part of becoming a digital council, we will in time no longer need the traditional face to face service presently delivered by our service points.

We will continue to grow our services online so that the gaps in service delivery, which are currently dealt with by the service points, are eliminated.

A better website

Southwark's Digital Strategy recognises that "the design and structure of the current website can be counterintuitive and confusing." Despite an excellent record of always keeping customer data secure, our existing website needed modernising in order to make it a more stable and attractive place for customers to visit. We have already started to upgrade our website and the latest version went live at the beginning of December. We will continue to make improvements to the website and make the customer experience better.

Our new website is a transactional led website with the emphasis on easy access and use of self-service facilities such as online application forms and online payments. Our new website is mobile and tablet-enabled with up-to-date and relevant information.

Reduced costs

By increasing our digital services, the Modernisation Programme Strategy has plans to reduce the number of council offices, providing better value for money. We will set challenging targets to help us achieve our goals.

Digital alternatives

We want to consider all forms of digital communications and technologies to explore the best balance between providing a great service which is also cost effective. Web chat, text messages and social media are just a few examples of the channels available for delivering services digitally.



Our commitments:

- We will redesign the call centre service to prioritise emergencies, assistance for vulnerable customers and provide technical support by 2020. Initial plans for this to be completed by December 2017.
- We will look to reduce gaps in our online service delivery offer in order to reduce reliance on the service points by 2018.
- A transformed, easy access, multiple platform website to launch December 2016.
- We will review website content at least every 6 months and identify opportunities for channel shift.
- Website availability over 99% of the time.
- We will make sure the most vulnerable customers continue to have access to telephone and face to face services.
- We will explore all forms of digital communications, technologies and potential channels for providing our services, such as web chat, text messaging and social media.
- We will reduce the number of council offices as set out in our Modernisation Programme Strategy.

Understanding

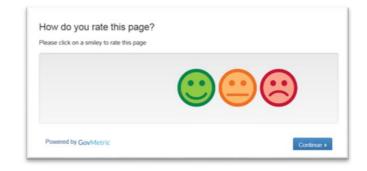
We will consult with customers and use feedback and data analysis to inform our decision making process and service design.

User groups

We have used user groups to test our services on My Southwark with customers. The feedback received has been used to assist with the design of My Southwark.

Customer feedback

The new website allows the customers to give feedback on every page. The user can rate the usefulness of the page on a red (poor), amber (average) and green (good) scale. There is also free text feedback to provide comments and suggestions which are very useful for understanding the customers' experience.



Social media

We want to offer our customers digital choice and we know that some users will prefer to communicate through social media such as Facebook and Twitter, whilst others may prefer to email, for example.

We want to listen to our customers on social media, so we need to tap into what is sometimes referred to as 'big data'⁵ and develop our reporting on relevant interactions. Plans for repurposing the Contact Centre will also help provide a resource for this.

Mystery shopping

Our mystery shoppers are a group of resident volunteers who test services based on scenarios posed by officers but agreed by customers. This helps us to determine the effectiveness of the service and to assess the customer journey and general experience that they have encountered.

We have carried this out on a number of our existing services already and the feedback and insight has proved very valuable. We will continue to utilise mystery shopping to test the effectiveness.

User Experience testing

The user experience is crucial to designing our online services so that people will prefer to use these over other traditional options.

We want to work with the service users to design our services so that it helps customers to help themselves, whether it is helping them to complete an online transaction or directing them to the exact service which can help them.

Similarly to mystery shopping, user experience testing provides great insight to test the effectiveness of services. However, we need to ensure that with these good intentions we have the tools to accurately measure and monitor the user experience. This will also inform us

⁵ Big data is a term for data sets that are so large or complex that traditional data processing applications are inadequate to deal with them.

about what skills customers need to use our services and the effectiveness of the end-to-end process.

Our commitments:

- We will use mystery shopping and user experience testing with our customers to develop user-friendly, intuitive online services.
- We aim to continually improve overall satisfaction ratings for our webpages through customer feedback and data analysis.
- We will review our use of social media as a communication tool and the needs of the users by December 2017.

Enhancement

We have already invested significantly in developing digital services by building online, customer access platforms. The main mechanisms are now in place and the next steps are to maintain and refine the services.

My Southwark refresh

My Southwark has a crucial role to play in our Customer Access Strategy. Our aim is to deliver a customer experience where services can be accessed at a time convenient to our customers.

Our My Southwark online platform is now four years old and it is time to consolidate the service. The user experience will be improved by allowing the customer to shape My Southwark so that it only shows the information which is relevant to them. We want it to be a personalised customer account similar to what customers find with online banking. The refreshed service will also be able to make recommendations to the customer which are appropriate to them, for example recommending that a council tenant may want to sign up for the Self-serve online account.

We are continually looking to enhance the services provided on My Southwark. We are currently completing the next phase of the housing repairs online project, which will allow customers to manage their appointments online (repairs can already be requested and tracked).

We want to provide comprehensive self-serve customer access for as many of our services as possible so that self-service becomes the norm for our customers. This will mean, for example, whether a customer is trying to book a pest control appointment or book a place on a digital skills training course at a library, the booking can be fully completed online.

This will mean that customers can access self-service at any time that is convenient to them, without having to call the contact centre during traditional working hours. This will also reduce the reliance on officers to complete the bookings, transactions or service requests, which should result in a more efficient service for both the council and the customer.

Improving our online services for businesses

The business portal <u>www.southwark.gov.uk/business</u> was set up to make the website more effective for businesses. It was launched in 2013 and consultation was carried out shortly afterwards. Further works were identified and whilst much of this has since been completed, there is still more to do, such as informing businesses of town centre and high streets data.

The redesign of the council's website presents an opportunity to refresh both the content and structure of the business portal to improve its usability and effectiveness. We need to make sure that our services are responsive and meet the needs of businesses. The last consultation took place in 2013 so it is also timely for us to revisit this.

Businesses can already pay their business rates through the council's Pay for it section of the website. Businesses can sign up on My Southwark already to view their business rate accounts online and it also gives them access to options such as E-billing, viewing transactions and downloading and printing statements. Despite nearly 11,500 companies paying business rates in the borough, only around 150 have signed up to My Southwark.

The feedback received has identified the potential to tailor the online services for different sized businesses, so that the questions are more relevant to, for example, sole traders or large limited companies.

A bigger take up of My Southwark for businesses has the potential to reduce telephone interactions and the costs of paper billing. This will have financial benefits for both the customer and the council.

Review of Key Performance Indicators (KPIs)

We want our KPIs to focus on the success of channel shift rather than focussing on the traditional KPIs around telephone response times at the Contact Centre. The KPIs should also reflect how quickly transactions were carried out and how little time customers spent on webpages.

'Big data' and our Customer Relationship Management (CRM)

Big data is going to have an increasingly important role to play. Our CRM system plays a crucial role in how we engage and interact with our customers to provide services. A CRM IT system enables us to store data on an individual customer basis, to have one view of all their interactions with us and use the analytical functions. It is one of the key digital tools we will look to expand use of in order to realise efficiency savings and support the provision of great customer interactions with us such as direct appointment booking.

We will produce a CRM strategy by 2017 which will aim to maximise efficiencies and provide great customer interactions.

Our commitments:

- Housing Self-Serve to allow customers to make more transactions and appointments online.
- We will publish a Customer Relationship Management (CRM) Strategy by 2017.
- We will refresh the design of My Southwark by Spring 2017.
- We will review all relevant performance indicators by Spring 2017 so that the emphasis is on the progress of channel shift.
- We will review the online business portal. This will form part of our digital service consultation which we aim to conduct in 2017 and implement the improvements by 2018.



Awareness

We will progress channel shift with initiatives to increase awareness of digital resources available to customers.

Targeted email delivery

We have recently procured a service through GovDelivery which enables us to send targeted emails through My Southwark. In future this should allow us to communicate information to customers about our services to increase awareness about the full range which they could benefit from.

We can use data provided by the customers to build a picture of what is relevant to them. If they are a business owner or a council home resident it can allow us to send emails to them about relevant events and the latest developments. Other examples are being able to follow the progress of a planning application in My Southwark, the offer for free swim and gym or information about a children's holiday club.

Community Engagement.

We need to increase our understanding of what the customer expects from us to provide as a digital service. We will follow the principles set out in our *Approach to Community Engagement* and conduct a consultation to help us get a clearer understanding of the needs of our customers and their expectations for our future services. We realise how important attracting businesses to Southwark is for the local economy, so we want to also make sure that our digital services meet their requirements.

Promoting My Southwark and self serve

Our refreshed website will actively promote My Southwark. We will also pilot new ways to promote My Southwark on the website too. Staff will refer customers to online services for future reference, for example for bulk collections and housing repairs.

Our commitments:

- 70% of customer services transactions via online Self Service by 2020. (Currently 40%).
- We will conduct a digital service consultation by 2018 to improve our understanding of the customer and help us understand their expectations for our future services. This will include local businesses to make sure we are listening to what their needs are too.

Inclusion

We will ensure all customers can easily access information and have their needs considered.

Our aim is to make the online services an excellent customer experience so that our customers choose it as their first option, where possible.

We have developed our online services so that they are intuitive and follow best practice of using image icons to guide users, so that the website is more accessible to everyone.

We will ensure that, in the event of emergencies and for our vulnerable customers, a phone service is available.

We know that our users are changing. With every generation, 'digital literacy' is improving.

In 2016 Southwark published its Digital Strategy which made digital inclusion a priority, "as an organisation we must focus on making digital services for the majority of our customers to access independently but also devise inclusive manual approaches and processes for the vulnerable and less digitally able in our communities. Services must promote and support appropriate digital transitions in order to realise much needed financial and resource efficiencies."

Technology's role in reducing exclusion

We have designed our online platforms so that they are accessible to as many people as possible. For example, the new website has an audio function and the ability to change font size and colours. Services such as Google Translate can also make it much quicker for some customers to understand the content of emails and webpages in contrast to traditional paper letters too. We are using the potential of technology to make our services more inclusive than ever.

Digital skills training

Work to minimise digital exclusion in Southwark started in 2013 with focus groups and workshops set up to gather resident views on what problems to solve, and how best to solve them. Digital inclusion hubs and digital skills training have been set up to help solve the problems. These have been set up mainly in tenant community halls in addition to some local enterprises. The hubs enable residents, particularly those with limited or no previous experience of using a computer, to learn digital and skills to help them get online.

We will provide appropriate free training at a variety of local venues, including libraries, for any customer that needs help to get online.

50 Digital Champions trained so far and being supported by Thames Reach.

Libraries

We want our libraries to flourish and be seen as a focal point for the communities. As services move online and we consider the future of the remaining two service points, libraries have a role to play to ensure that we maintain our human interaction, with everybody able to access the same services and nobody being digitally excluded. We also want to maintain our free access to the internet at our libraries.

We need to make sure our libraries have the capacity to cope with additional customer demands, so first of all we will need to carefully review the our libraries to make sure we are providing the right support such as classes for accessing the internet and services provided by Southwark.

Our commitments:

- Improved customer satisfaction with year on year fewer formal customer complaints made.
- Volunteer digital champions to train at least 500 new learners to develop digital skills by 2020.
- We will provide appropriate free training at our libraries or Digital Inclusion Hubs for any customer that needs help to get online.
- We will aim to have 5,000 ICT training places in our libraries in 2017 and match that for each subsequent year.
- We will conduct surveys and use our volunteers to check on progress of all customers who have received digital skills training to see if it has helped them to get online to use our services.
- We will review our customer access services to ensure digital inclusion is fit for purpose. Review to be completed by December 2017.

The next steps

We will make sure that all services are regularly and effectively reviewed to ensure that the aspect of customer focus is central to our methods of delivery and access to the services.

In summary, we will:

- Improve customer satisfaction through the provision of modern and more convenient ways of doing business with us.
- Provide better value for money in terms of more cost effective service provision.
- Work with service units to encourage channel shift through the provision of more convenient services through digital means.
- Ensure that all of our customer facing activities accord with the requirements of our vision for equalities.
- Invite regular feedback on how we are doing and let our customers know when we improve our service provision as a result of feedback received.

Appendix A – References to other strategies and documents

The following guidance, programmes and strategies has been referenced and have helped inform the development of the Customer Access Strategy 2017-2020.

- Council Plan 2014-2018 (June 2015 update)
- Southwark's Digital Strategy. Your Digital Council. February 2016.
- Southwark's Fairer Future Modernisation Programme Strategy 2017-2020
- Digital Transformation Programme.
- Customer Access Strategy, Southwark Council, 2012.
- Cabinet Report Paper (December 2016) Refresh of Southwark's Economic Wellbeing Strategy 2017-2022.
- Gov.uk Encouraging people to use your digital service.
- Civica. Enabling a new world of public service delivery.
- Deloitte. There's no place like phone. Consumer usage patterns in the era of peak smartphone. Global Mobile Consumer Survey 2016: UK Cut

Appendix B – Customer Service Standards

Southwark: Customer Service Standards

Treating residents as if they were a valued member of our own family.

When it comes to customer service, we know that you want us to deliver the services that you need, meeting the promises we make for quality and time. You also expect us to keep you well informed and to treat you with respect.

To ensure that we provide a high quality customer service, these are our commitments to you;

- We will be easy to contact and do business with
- We want to provide a service which is accessible and available, so you can use our online services and view the latest information at a time and place that is convenient to you
- We will make sure that alternative access, such as a telephone service, is in place for the people who really need it, such as emergency situations and the most vulnerable customers.
- The staff you deal with will be knowledgeable, polite and respectful and they will give you their name and take responsibility for helping you or will find someone who can
- Our aim is to say "yes" but we will be clear and straight forward where we can't help, and where possible, we will point you in the direction of somewhere that can.
- We will deal with you as efficiently and quickly as we can
- We will do our best to develop online services which can get it right, first time
- We will continually improve, ensuring that our services represent good value for money for residents, keeping resources focused on service delivery
- We will keep up with the development of new technology so that you can access our services in the modern ways you want
- We will treat you fairly, with courtesy and respect
- We will communicate with you in a clear and honest way and give you the right information for you to make choices
- Where you have a problem, we will listen to you and properly understand the issue.

• We will value your feedback and will use your comments and complaints to improve our services for the future

Appendix C – Achievements for the key elements in the Customer Access Strategy 2012

Objective 1:

Single in-house contact centre and switchboard at Queens Road

Outcome - achieved.

• £4.5m savings achieved to date.

Objective 2:

Fully rationalised customer access points.

Outcome - achieved.

- We have moved to an appointment only system at the Service Points.
- We reduced from three to two service points.
- We closed our cash offices and moved the payment services online.

Objective 3:

An up to date modern website through which most services can be transacted.

Outcome - achieved.

- New website launched December 2016.
- Dedicated website team created to develop and continually improve online services.

Objective 4:

Self-service promoted and encouraged.

Outcome - partly achieved. Work to do.

- We have had a big take up with My Southwark accounts, over 150,000 registered accounts.
- Take up of other digital services, such as the online repairs service, still has room to grow but we have seen a steady increase in take up.



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