

## **Summary Sheet**

### **Committee Name and Date of Committee Meeting**

Cabinet & Commissioner Decision Making Meeting – 21 May 2018

### **Report Title**

Customer Access Strategy

### **Is this a Key Decision and has it been included on the Forward Plan?**

No

### **Strategic Director Approving Submission of the Report**

Judith Badger, Strategic Director of Finance and Customer Services

### **Report Author(s)**

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### **Ward(s) Affected**

All

## **Summary**

The Council is committed to providing all customers with access to the help and advice they need regardless of anyone's personal situation; delivering services in a way that is simple, easy to understand, joined up, reliable and right first time.

A new Customer Access Strategy is required to replace the now expired Customer Access Strategy. This provides an opportunity to refresh the Council's approach by adapting to changing customer needs and expectations and advancing technology; thereby demonstrating a modern, efficient council that makes best use of available resources and provides value for money, customer-focused services.

The refreshed strategy seeks to strengthen customer relationships, enhance experience and increase satisfaction. It also aims to influence positive behaviour changes by encouraging engagement, involvement and increasing digital inclusion. The strategy provides a framework that cuts across all areas of business, placing the customer at its heart and adopting a digital first ethos that enables greater control and independence without excluding anyone from accessing the help, information and advice they need.

## **Recommendations**

- 1 That the progress of the Customer Service & Efficiency Board work programme be noted.
- 2 That the Customer Access Strategy be approved for publication.
- 3 That any significant changes required following annual reviews of the Strategy be subject to further reports for Cabinet consideration and approval.

## **List of Appendices Included**

Appendix 1 Draft Customer Access Strategy

Appendix 2 Stakeholder Engagement

## **Background Papers**

RMBC Digital Council Strategy 2016 to 2019

Council Plan 2017-20

## **Consideration by any other Council Committee, Scrutiny or Advisory Panel**

Overview and Scrutiny Management Board – 16 May 2018

## **Council Approval Required**

No

## **Exempt from the Press and Public**

No

## **Customer Access Strategy**

### **1. Recommendations**

- 1.1 That the progress of the Customer Service & Efficiency Board work programme be noted.
- 1.2 That the Customer Access Strategy be approved for publication.
- 1.3 That any significant changes required following annual reviews of the Strategy be subject to further reports for Cabinet consideration and approval.

### **2. Background**

- 2.1 The Customer Service & Efficiency Board was established in September 2017 to deliver a strategic approach to service delivery and support the Council in the realisation of significant efficiencies.
- 2.2 The Board, chaired by the Strategic Director Finance and Customer Services, approve the Customer Service & Efficiency work programme; a comprehensive range of projects which will deliver:
  - The implementation of essential underlying technology to enable improved and extended digital capabilities and greater use of automated self-serve channels.
  - The consolidation of departmental customer service functions into a single corporate delivery model within the Finance & Customer Services directorate; creating a more effective, efficient and consistent multi-channel service.
  - Value for money and customer centred Council services through redesign and business process re-engineering.
  - Increased digital inclusion, making every contact count by encouraging customers to engage online and supporting them to grow their skills and confidence through a corporate wide digital champion programme.
  - A more robust and joined up approach to the provision and communication of customer information; reducing the amount of print and outgoing post and making best use of social media to encourage those online to stay online.
  - Redefined customer service standards and a workforce wide strategy that raises the profile of customer service and achieves recognised accreditation.
- 2.3 The Customer Service and Efficiency Board are responsible for ensuring project sponsors take responsibility for deliverables and all financial savings established through the programmes and that these are captured accurately.
- 2.4 The Customer Service & Efficiency board is also responsible for the Council's Customer Access Strategy and the delivery of underpinning activities.
- 2.5 Technological advancement and changing customer behaviours and expectations mean that the way the Council provides access to services must be regularly reviewed.

2.6 It is important that all customers continue to have access to the services they need irrespective of their personal situation, and that the information and advice they receive is simple and easy to understand, joined up, reliable and right first time.

2.7 The purpose of a Customer Access Strategy is to set out how the Council aims to achieve the above, building on the Council's values to strengthen customer relationships and improve service delivery.

2.8 A new Customer Access Strategy is required to replace the now expired Customer Access Strategy 2011 to 2015.

2.9 The new strategy forms the framework for the way customers access services and the way the Council delivers them; cutting across all areas of business to deliver greater efficiency, make better use of resources, and improve customer experience.

2.10 The new Customer Access Strategy is aligned to the Council Plan and the Council's Digital Strategy. It has a greater digital focus to reflect the vision for a modern, efficient council that makes best use of available resources and provides value for money, customer-focused services.

2.11 The aims and objectives of the Customer Access Strategy form the basis for the Customer Service & Efficiency work programme which is driving the:

- Implementation of essential underlying technology
- Redesign of business processes
- Challenge to the way the Council delivers its services
- Delivery of excellent customer service

2.12 This report sets out the proposed new strategy, subject to Cabinet approval, which will be reviewed on an annual basis to ensure it remains fit for purpose and continues to meet customer needs.

### **3. Key Issues**

3.1 The new Customer Access Strategy sets out the Council's continued commitment to providing all customers with access to the information and services they need, in a modern, efficient, and effective way that delivers value for money.

3.2 The fundamental principles of the strategy are that it enables:

- Access to help, advice and information for all Rotherham customers irrespective of their personal circumstances.
- The delivery of high quality 'digital first' services that are designed and built around customer needs to give people greater control and independence.
- Simple, effective and joined up processes that are consistent and right first time.

- The growth of digitally enabled and digitally active customers through targeted promotion, support and mediated access.

### 3.3 The outcomes sought from the Customer Access Strategy are:

- Irrespective of the channel they choose, customers have access to the services they need, with information and advice that is simple and easy to understand, joined up, reliable and right first time.
- Customers and communities are involved in the design and testing of new services and processes and their thoughts and ideas are used to positively influence change and improvements.
- Improved customer experience with new and redesigned services delivering a customer journey that is as short and simple as possible. Customers only have to tell their story once and the Council provides them with clear and accurate information so they know what to expect and when.
- Customers receive excellent customer service from all Council employees and value the services the Council provides. They have the trust and the confidence that they will be able to receive the help and advice they need regardless of the access channel they choose.
- The Council makes the most of every contact by making customers aware of other services that might be of benefit, supporting and helping them to become more independent.
- A ‘digital champion’ ethos in collaboration with communities, partners, voluntary sector and charitable organisations to implement schemes that are designed to increase digital skills and confidence.
- Increased digital inclusion across the borough with customers and communities supported, motivated and interested in the wider benefits that being online can bring to their daily lives. For example, looking for jobs, saving money, finding out about personal interests and hobbies and keeping in touch with family and friends.
- A more intuitive website that offers customers a greater choice of things to do online, and the ability to book and pay for events and services in one easy step without the need to contact the Council in person or by telephone.
- Greater use of interactive content such as online video tutorials that show people ‘how’ to do things and mapping functionality to improve location accuracy.
- Customers become advocates of Council digital services and encourage their own family and friends to adopt online ‘self-serve’ as their preferred access channel.
- Council employees continuously look for ways to improve service delivery, influence positive behaviour changes and demonstrate the Council’s core values in everything they do.
- A modern, efficient council that makes best use of available resources and provides value for money, customer-focused services.

## 4. Options considered and recommended proposal

### 4.1 Develop a new Customer Access Strategy (Appendix 1).

### 4.2 For the council not to develop a new Customer Access Strategy.

- 4.3 Following consultation with a wide range of stakeholders it is recommended that Cabinet approve the new Customer Access Strategy.
- 4.4 The new Customer Access Strategy will be reviewed annually so it can adapt to changing customer need and technology advancements

## **5. Consultation**

- 5.1 Whilst there is no requirement for the Council to formally consult on the new Customer Access Strategy, officers have engaged with multiple stakeholders to incorporate their views and suggestions into the proposed document.
- 5.2 The draft strategy was made available on the Council website allowing the public to submit comments.
- 5.3 Appendix 2 provides (Stakeholder Engagement) provides further details regarding the groups and individuals involved in this process.

## **6. Timetable and Accountability for Implementing this Decision**

- 6.1 Subject to approval the new Customer Access Strategy will be published online
- 6.2 The previous version of the Customer Access Strategy will still be available to view as an archived document.
- 6.3 The Customer Service & Efficiency Board will be responsible for the delivery of the underpinning work programme.

## **7. Financial and Procurement Implications**

- 7.1 There are no financial implications arising from this report.

## **8. Legal Implications**

- 8.1 There are no direct legal implications arising from this report.

## **9. Human Resources Implications**

- 9.1 None.

## **10. Implications for Children and Young People and Vulnerable Adults**

- 10.1 As set out in the report.

## **11. Equalities and Human Rights Implications**

- 11.1 An Equality Impact Assessment has been completed.

## 12. Implications for Partners and Other Directorates

12.1 Officers have engaged with partners and other directorates to ensure the Customer Access Strategy reflects their needs as well as those of other stakeholders.

## 13. Risks and Mitigation

Risk	Description	Mitigation	Impact and Probability
The expired strategy is not replaced	The outdated version of 2011-2015 does not portray a modern, efficient council potentially undermining the Council Plan and vision	Publish a refreshed Customer Access Strategy to reflect the current and future needs of the Council, its customers and communities	Medium, Low
The new Customer Access Strategy becomes outdated	The strategy does not keep up with the pace of change; whether this be due to changing Council/Customer needs or technological advancements	There will be a mechanism for customers and communities to continuously share their thoughts and suggestions. The strategy will be reviewed annually and this feedback will be taken into account with any proposed changes subject to Cabinet consideration/approval	Low, Low
Reputational risk from non delivery of the things we said we would do	For example: <ul style="list-style-type: none"><li>Range of online services slow to grow</li><li>Business processes do not improve</li><li>Technology improvements are not forthcoming</li><li>Customers do not get the support they need</li><li>Customers cannot access the services they need</li><li>Information is inconsistent</li><li>Digital engagement stagnates</li></ul>	<p>The Customer Service &amp; Efficiency board will be responsible for the delivery of the Customer Access Strategy aims and objectives.</p> <p>Each sub project has been incorporated into the work programme</p> <p>Progress is reviewed on a monthly basis, details of which are shared with cabinet and board members on a monthly basis</p>	High, Medium

## 14. Accountable Officer(s)

Luke Sayers, Assistant Director – Customer, Information and Digital Services  
Helen Barker, Head of Customer Services

Approvals obtained on behalf of:-

	Named Officer	Date
Strategic Director of Finance & Customer Services	Lisa Darnell	04.04.2018
Assistant Director of Legal Services	Stuart Fletcher	05.04.2018
Head of Procurement (if appropriate)	N/A	
Head of Human Resources (if appropriate)	N/A	

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This report is published on the Council's website or can be found at:-

<http://moderngov.rotherham.gov.uk/ieDocHome.aspx?Categories=>

**Appendix 1 - Customer Access Strategy**

**FRONT COVER**

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# 1. Foreword

This section will include an introductory message about the Council, its priorities and challenges, and how this links in to the Customer Access Strategy.

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## **2. Why do we need a Customer Access Strategy?**

People regularly use the internet for all kinds of reasons. Being able to 'self serve' at a time to suit yourself and your lifestyle gives people greater control and independence and puts them in touch with information and services any time of day or night. We want to encourage and support more of our customers and communities to have these same choices too.

This strategy sets out how we will make it easier and more attractive for people to access services online, whilst at the same time making the best use of technology to work in a more cost effective way. Increasing the number of people who regularly 'self-serve' rather than choosing to phone or visit a council office, will help us target our resources more effectively to prioritise the people and communities who need help the most..

Of course we also understand that going online isn't for everyone. Our communities are diverse with a wide range of people who have differing needs and preference. This strategy has therefore been designed to make sure everyone has equal access to the information and help they need regardless of their individual circumstances, whilst also helping and supporting people to enjoy the wider benefits that being online can bring to their daily lives. For example, looking for jobs, saving money, finding out about personal interests and hobbies and keeping in touch with family and friends

### **Did you know:**

- Over 30,000 people have already signed up to 'Your Account' giving them 24/7 access to Council Tax, Benefits and Bin collection information. Once you've registered there will be no more need to file your paper Council Tax bill as your electronic version will be available to view online whenever you need it. Just one of the many benefits you could have by signing up.
- In 2017 we received over 54,000 online forms for a range of service requests – a much easier and faster way to tell us about the things that matter to you and no postage costs either
- You can pay online for a range of services, as well as via the automated telephone payment line. We received over 150,000 payment transactions using these methods last year
- 62,000 people have already signed up for email alerts and the number is growing. Look for the 'stay connected' button at the top right of the Council's website home page. You can register with your email address or using your preferred social media account, keeping you up to date about subjects you're interested in

- 'Liking' our Facebook page means you will regularly receive information and news about Council services, events, consultations and much more
- Following us on Twitter means you'll receive Council news as it happens

We want everyone in Rotherham to make the most of all the digital opportunities available and help and support more of our customers to get online so that this becomes the natural way they do business with the Council.

### **3. Doing things digitally and doing them better**

The Council's [Digital Strategy](#) sets out our vision for putting technology at the forefront of our journey and recognises what digital can do for Rotherham.

When we talk about 'Digital' we mean the Council's website, social media messaging (eg. Facebook, Twitter), 'Your Account,' website forms and emails. In the future 'digital' services may also include other options such as voice activated information.

By expanding what we provide digitally customers will benefit from an even wider choice of online services – all of which are accessible any time of day or night giving customers immediate access to information and advice and a written record that can be saved to their own devices. Working digitally also means that as a Council we are able to promote news and opportunities, and talk to our customers and communities much faster and across wider geographical areas at the touch of a button.

There's always room for improvement and we want to make our online access easier and give our customers an even better experience so they increasingly choose to access services this way.

#### **We will:**

- Make as many of our services available online as we can so that customers can do what they need to do at a time to suit them without having to contact the council using other means.
- Make sure our online services are designed for use on smartphones and tablets so that the growing number of customers using mobile devices can access Council services regardless of the device they use

- Increase the number of services you can access through 'Your Account' and make it easier for you to register. For example by allowing you to 'sign in' with the same username and password as other Council online accounts or by using your social media account details (eg Facebook, Twitter)
- Make it easier to book and pay for events and services in one easy step
- Improve the layout of our website and make the content more user friendly so that information is easier to find and access
- Continuously review the search words and phrases our customers use so that the search results are more accurate
- Improve our online processes so that you only have to tell us your information once
- Provide more online forms so we can help customers to provide us with the specific information we need rather than expecting them to tell us in an email
- Where possible allow customers to upload copies of documents online instead of asking them to provide original paper versions
- Make better use of online maps so that customers can pin a location to make it easier for them to report things
- Introduce more online videos to visually help, guide and inform our customers about the things they need to know
- Make sure our digital services meet accessibility standards
- Join our systems together so you can more easily access your information and track the progress of your applications or reports
- Introduce 'web chat' to guide customers to the information they're looking for or help them if they appear to be 'stuck' on a page
- Always prioritise your online safety by implementing best practice security measures. For example, the 's' in the website address https stands for 'secure.' We will also share helpful hints and tips with our customers to help them feel more confident about the way they access and make use of online services
- Make more use of social media to stimulate online interest and increase participation
- Make sure you know what to do and where to go if things go wrong or something is really urgent
- Keep up to date with new technology so we can continue offering customers a greater choice of digital 'self-serve.'
- Encourage customers to communicate with us online so letters and paper documents are only used when there is no other choice

#### **4. Help and support for all our customers**

Some of our customers may not even be aware of all the digital services currently available to them and we know we need to do more to promote them. Other people want to do more online but don't currently feel able to. This could be due to a lack of confidence in new technologies, or nervousness about the safety of conducting business in this way. For others, the cost of equipment, and mobile or broadband charges might prevent them from accessing services digitally. Whatever the reason, we want to do all we can to help as many people as possible enjoy the benefits that being online can bring.

##### **We will:**

- Encourage all customers to make use of digital 'self-serve' so they can find out about the things that matter to them – not just Council services.
- Promote online services at every opportunity to increase interest and awareness
- Provide digital assistance in every library and Customer Service centre so that customers who need help feel supported and able to access the services they need. This might mean showing people how to set up an email address or helping them complete an online form. Whatever their needs are, we will support all customers in a way that best suits their situation and reason for contacting us
- Enable all our frontline staff to support customers to access online services, equipping them with mobile devices and tablets so they can show customers how to find information and services using devices they are more familiar with – not only at Council offices but for staff working in the community too
- Create 'digital champions' to work closely with customers and communities to increase their online interest, confidence and skill. This might include coaching individuals, attending group meetings to show what's available online, or putting people in touch with providers of basic ICT courses such as the ones currently provided in libraries, education services and the voluntary sector
- Work with our communities, partners, voluntary sector and charitable organisations to implement schemes that are designed to increase digital inclusion
- Work with the business community to identify other organisations who could help us increase the number of people who can get online and stay online. We will also seek out events and activities to further promote and encourage digital engagement
- Continue providing free Wi-Fi for public use in Council owned buildings such as libraries and customer service centres, and subject to funding look to extend this to other locations such as the town centre
- Make sure all our services are accessible so that regardless of anyone's personal situation, no one feels disadvantaged. We realise that going online isn't for everyone and for some services there may be other self-serve options available too. For example text messaging, automated telephone service. Customers can also still contact us by phone or visit us at a Neighbourhood Hub

## 5. What we need from you

We want to continue offering value for money services to all our customers and communities. Supporting and encouraging more people to 'self-serve' frees up valuable resources which means we are better able to assist our most vulnerable customers and prioritise support for people who need help the most.

Here are some simple and easy things you can do to help us achieve this:

- Before thinking about visiting a Council office or picking up a phone, visit [www.rotherham.gov.uk](http://www.rotherham.gov.uk) It's open 24 hours a day, every day of the year.
- Encourage your family and friends to do the same, or offer to help family members who aren't able to do this themselves. Many people don't realise how many different things they can do online and could be missing out on a number benefits and opportunities.
- Sign up to 'Your Account' – it only takes a few minutes but gives you personalised access to your key services such as Council Tax and benefits. We will be increasing the number of services available through 'Your Account' and once you're signed up we will be able to keep you updated with any changes
- If you currently make cash payments to the Council why not consider using another method? You can pay online for lots of services using debit and credit cards and Paypal. There are other self-serve options too such as payment by automated telephone. Or why not set up a Direct Debit for your Council Tax? Simply sign in to 'Your Account' and follow the instructions
- 'Following' us on Twitter and 'liking' our Facebook means you'll be able to find out what's happening in your community, engage in conversation with people who have similar interests, and be in touch with Council news as it happens
- Sign up to email alerts to be automatically notified about the things you're interested in
- Let us help you to help yourself – we want everyone to benefit from accessing services online so will always encourage you to try it for yourself. If you've never been online before, or aren't sure how to access a service we will support you by either talking you through the process or sitting with you to show you how it works.
- Make use of the digital skills training and support the Council offers – call into any library, customer service centre or community hub to find out more
- If we make you an appointment, please let us know if you can't attend beforehand so we can offer it to someone else.
- If you do need to come and see us, make sure you bring your documentation and information so we can deal with your request faster and reduce the number of times we need to see you
- Keep us updated with any changes that could affect the services you receive from us
- Be polite and respectful – we want to help you but will not deal with violent, rude or disruptive customers

## **6. Your experience matters**

Regardless of the type of enquiry, or the way a customer accesses a service, we need to make sure their experience is a good one. Our customers should not need to know or understand how each Council department works. But they should be able to expect excellent customer service and things done right the first time.

Our services should be designed and built around the needs of our customers and communities. Which means involving our customers more and listening to their feedback so that wherever possible we continually develop and improve what we do.

### **We will:**

- Encourage your feedback by making it easy for you to tell us what you think about the way we deliver our services. For example through social media, our website, resident surveys and consultations
- Listen and respond to what you tell us, take your views into account to influence change and make sure we tell you what we've done as a result
- Redesign our services by removing unnecessary tasks so the customer journey is as short and simple as possible and you only have to tell your story once improve customer experience
- Review the range of telephone numbers we use so that where there is a need to provide service in this way, it's as easy and simple as possible
- Be clear about the different stages of a process and the timescales involved so you know what to expect
- Confirm receipt of your enquiry and keep you informed of progress when you have asked us to do something
- Invite customers and communities to help us design and test drive new services/processes
- Acknowledge when we've got it wrong and take steps to put things right as quickly as possible
- Make the most of every contact by making customers aware of other services that might be of benefit
- Encourage our workforce to think digitally and continuously look for ways we can improve our service delivery
- Provide all our employees with the appropriate training to deliver excellent customer service and set clear standards to measure how this is achieved
- Continuously review the way we work so we use what we have learned from our customers to shape what we do in the future

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## Appendix 2

### External Stakeholder Engagement

In addition to the wider public engagement via the website and social media, the following partner agencies, community groups and voluntary organisations have each been invited to share their views:

- Action Housing
- Action in Rotherham
- Adult Community Learning
- Age UK
- Carers forum
- Citizen Advice Bureau
- Clearways
- DWP
- Faith groups
- Housing Involvement Panel
- Job Centre
- Lighthouse project
- Mind
- NHS
- Parents Forum
- Pride of Rotherham
- Rainbow project
- Rotherfed
- Rotherham Disability Network
- Rotherham Ethnic Minority Alliance
- Rotherham Older People's Forum
- Rotherham Pensioners Action Group
- Rotherham Rise
- Rotherham Sight and Sound
- Rotherham United Community Sports Trust
- Rotherham Visually Impaired Group
- Rotherham Youth Council
- Rotherham Youth Parliament
- Shiloh
- sight and sound
- South Yorkshire Housing Association
- South Yorkshire Police
- Speak Up
- Target Housing
- Thursday Project/Crisis
- Voluntary Action Rotherham
- Yorkshire MESMAC