

# BRIEFING PAPER

---

**SUBJECT:** CUSTOMER ACCESS STRATEGY  
**DATE:** 16 DECEMBER 2021  
**RECIPIENT:** OVERVIEW AND SCRUTINY MANAGEMENT COMMITTEE

---

## THIS IS NOT A DECISION PAPER

### SUMMARY:

The Customer Access Strategy 2022-2026 is intended to replace the current Customer Strategy 2018-2022. It outlines the council's strategic vision to put customers at the heart of everything it does, and sets out how it intends to deliver services going forwards in an ever changing digital world. It will contribute towards achieving the outcomes detailed in the Corporate Plan 2021-2025. It links closely to, and is supported by, the IT Strategy, which is also being presented to Cabinet in December 2021.

### BACKGROUND and BRIEFING DETAILS:

1. The Customer Access Strategy 2022-2026 will set out how we will improve access to our services for our customers. We want to make dealing with the council as quick and easy as possible, making the best use of technology whilst working in a cost-effective way. We want customers to have the best possible experience when they use our services, and we recognise that people contact us in many ways – one size does not fit all. This strategy will outline how we will develop a variety of access channels for our customers and continue to improve the quality and consistency of our services, outlining principles which will guide the design and delivery of services.
2. The strategy sets out the context for the current work intended to make us easier to deal with for residents, visitors, businesses and other stakeholders. We want to put our customers at the heart of everything we do, reflecting their feedback in the design and delivery of services, and to provide appropriate support to those who need it, ensuring that customer experiences are easy, effective and convenient.
3. The strategy outlines the council's commitment to customers through three key customer service principles which will direct activity, and deliver improvements while reducing costs and creating efficiencies:
  - **1. Keep the customer central** – when designing changes use customer data and test with users, understand the experiences from the users perspective and collect regular user feedback to support continuous improvement.
  - **2. Aim to resolve things in one contact** – first time resolution should always be the aim, reducing the amount of times people need to tell their story and gathering all the information needed to resolve their issue.
  - **3. Always be clear about expectations and keep customers in the loop** – letting a customer know how long things will take to complete and keeping them up to date

# BRIEFING PAPER

throughout reduces unnecessary contact and ensures the customer is clear about what is happening at every point.

4. The strategy also sets out a plan for each channel the council uses to enable customer contact so that the organisation can be consistent and work towards an improved position.

## **RESOURCE/POLICY/FINANCIAL/LEGAL IMPLICATIONS:**

5. The work to deliver the aims and objectives of the strategy are principally covered in the Customer Experience Programme with the rest being picked up as business as usual.

## **OPTIONS and TIMESCALES:**

6. To approve and implement the strategy which will set out the vision and direction of travel for customer focused changes for the next five years.

## **RISK MANAGEMENT IMPLICATIONS**

7. None

## **Appendices/Supporting Information:**

1. Annex 1 – Draft Customer Access Strategy

<b>Further Information Available From:</b>	<b>Name:</b>	James Marshall - Head of Customer and Communications
	<b>Tel:</b>	023 8083 3015
	<b>E-mail:</b>	james.marshall@southampton.gov.uk

# CUSTOMER ACCESS STRATEGY 2022-2026 - DRAFT

WE WANT TO PUT ALL OF OUR CUSTOMERS AT THE HEART OF EVERYTHING WE DO, REFLECTING THEIR FEEDBACK IN THE DESIGN AND DELIVERY OF SERVICES, AND TO PROVIDE APPROPRIATE SUPPORT TO THOSE WHO NEED IT ENSURING THAT CUSTOMER EXPERIENCES ARE EASY, EFFECTIVE AND CONVENIENT.

# Foreword

The customer access strategy will set out how we will improve access to our services for our customers. We want to make dealing with the council as quick and easy as possible, making the best use of technology whilst working in a cost-effective way. We want customers to have the best possible experience when they use our services, and we recognise that people contact us in many ways – one size does not fit all. This strategy will outline how we will develop a variety of access channels for our customers and continue to improve the quality and consistency of our services, outlining principles which will guide the design and delivery of services. Most of all though we want to commit to seeing customers as people and ensuring that systems work for them.

Southampton City Council is a series of around 700 different professions, trades and services the challenge is to create access that ensures a sense of a single organisation.

One of the objectives in the Corporate Plan 2021-25 is to deliver better customer experiences. In order to deliver this, we need to provide consistent and appropriate access to our services via the right mix of digital and non-digital channels to meet the needs of residents and enable delivery teams to focus on the effective delivery of their services.

*‘Getting the right access to council services is paramount for being an effective public organisation. This is how we deliver for our residents and provide them with value for money in our service delivery.’*

**Cllr Robert Harwood, Cabinet Member for Customer and Transformation**

# Executive Summary

- This access strategy sets out the aims and principles for how our various customers and service users will connect with services. This support service design to ensure that there is organisational consistency and ultimately that we are easy to deal with.
- The vision we are looking to achieve is; to put all of our customers at the heart of everything we do, reflecting their feedback in the design and delivery of services, and to provide appropriate support to those who need it ensuring that **customer experiences are easy, effective and convenient**.
- This strategy sets out the principles and processes for enabling customers to access council services which sets the tone and direction for how the organisation deals with customers.
- As a council we deliver around 700 services and these are to a wide range of customers. Changes in technology and customer expectation have created different pressures. We need to deliver the best possible service but in a cost-effective way, consistency and efficiency in the way our services are accessed enables this.
- Good quality customer access is built on the council delivering through its five core values of customer focus, can-do, curious and creative, collaborative and commercially aware.

# Our customers

Southampton is a vibrant multi-cultural city with a population of 254,275 people, 107,919 households and 6,745 businesses. The city is an important travel hub, tourist attraction and shopping destination, attracting large numbers of visitors each year. As a council we provide around 700 different services and demand for many of our services is increasing.

Our customers include everyone living, working, volunteering, investing, studying, running a business in or visiting Southampton. Some of our customers may access a number of council services or regularly report issues. At the opposite end of the spectrum are customers who rarely contact us at all. The most contact these customers will have with the council will be their annual council tax bill and monthly Direct Debit as well as their bins being collected. When designing and delivering our services we need to be mindful of different customer types to ensure we are catering for everyone appropriately.

## Categorisation of customers:

Occasional reporters	Regular customers
<p>These are customers who only occasionally need to get in touch with the council. 33% of our customers didn't contact us at all last year, and 31% of our customers only contacted us between 1-4 times, usually to report or apply for something. If these customers are residents, then it is more than likely they pay their council tax by Direct Debit. When they do need to contact us, these customers may be more inclined to go online, and they want to be able to deal with any issues quickly and easily.</p>	<p>These are customers who use council services more often, such as housing tenants or people who have parking permits or cross the Itchen bridge each day. They have more regular interactions with the council and need to check details more regularly, like account balances or reporting repairs for their home. Currently 26% of our customers contact us between 5 and 10 times a year and 9% contact us over 10 times per year. These customers want to be kept up to date about their services, and to get a consistent and high-quality service however they choose to get in touch.</p>
Vulnerable service users / reluctant customers	Commercial customers
<p>These can be people feeling anxious about a particular situation, such as reporting a neighbourhood nuisance or anti-social behaviour, or those who need ongoing or intensive support from the council. Vulnerable customers can include children and young people, and people who need the help of an advocate to help them contact us or access services. Some examples of services for more vulnerable customers are adults and children's social care, special educational needs and disabilities and homelessness. These customers may be more likely to need face to face meetings with council staff and need services to be designed in a way that is inclusive and supportive.</p>	<p>These are customers who choose to buy council services, such as pest control or commercial waste. They can be businesses or individuals. They have a choice about whether to buy services from the council or another provider, and want fair prices, as well as streamlined and simple access. As the council deals with the financial challenges it faces, one of our aims is to grow our commercial business so we can generate more income, so we need to make sure commercial customers have a positive experience dealing with us.</p>

## How do customers access services?

There are a range of reasons for these interactions including: information requests, service requests, issue reporting, payments, chasing outstanding enquiries, complaints, interactions as part of an ongoing case.

Below are the councils access channels and usage levels:

- Website with 8.5 million pageviews and 3.4 million total sessions, an average of 280k sessions per month in 2020
- SOBOT (Chatbot) which averages about 1,400 enquiries per month
- Web forms which had 245k form completions in 2020
- Webchat has generated 1,200 chats per month during 2020
- Social media which has generated on average over 3,400 enquiries per month in 2020
- There are nine public emails accounts managed in the contact centre which received a total of 76,000 emails in 2020
- Centrally advertised telephone numbers into the contact centre, which received 273,308 calls in 2020
- Gateway which had a total of 59,164 visits in 2019 (using this year as was closed in lockdown)
- There are also a range of other access points which sit outside the Customer and Communications team and don't report on/ measure volumes

### Types of access

There are different types of access to the council and council services which fall broadly into a few distinct categories, these are outlined below with some examples.

<b>Initial access</b>	Reporting, requesting, enquiring, paying, finding
<b>Repeat access (failure demand)</b>	Chasing action Refunds
<b>Erroneous access</b>	Why was the number 17 late? Can I report a pothole in Hedge End?
<b>Direct access</b>	Libraries Arts and Heritage Sure Start Day services
<b>Ongoing interactions</b>	Support from a named social worker Visits from environmental health officer

# Principles

These access principles are key enablers in achieving the overall aims of the organisation ensuring the customer comes first, such as first-time resolution, and adding value to the user and working as a single organisation. A centralised approach builds resilience and increases efficiency and supports the single customer view by eradicating silo thinking or approaches. All service design and transformation should adhere to these design principles to ensure that the organisation works towards a single customer focus operating model.

## Access principles

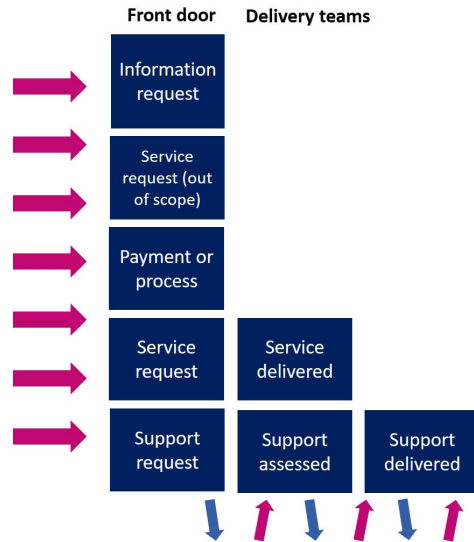
1. **Centralised front door** – initial contact is funnelled through a central point where requests can be filtered and assessed so only cases which need to, are put through to delivery teams. This approach can maintain a strategic overview of customers and the services they use/need.
2. **Triage and signpost** – the front door needs to be more than an access point, being able to triage and signpost where needed, adding value to the customer and managing demand. First time resolution may be achieved at this point.
3. **Choice of channel (and location)** – the right access point for the customer / situation, easy access depends on choice and keeping the channels on offer under review. Each channel should have a plan for improvement / development to ensure it is meeting the needs of those who use it.
4. **Reducing unnecessary contact** – proactive communication and updates can reduce the amount of contact from customers finding out what is happening about a situation or open case.
5. **Every interaction matters** – because of the size and complexity of the organisation there are lots of ‘touchpoints’ with customers from initial contact to service delivery and directly accessed services, each one of these is important in supporting the customer focus of the organisation. It is important to be aware of the whole and take responsibility for customers, effectively signposting or supporting. A ‘that’s not my department’ approach will only create further issues. This is also important in the way we refer to the council in conversations or communications as one brand, not emphasising lots of different team or service names.

## Customer service principles

1. **Keep the customer central** – when designing changes use customer data and test with users, understand the experiences from the user’s perspective and collect regular user feedback to support continuous improvement.
2. **Aim to resolve things in one contact** – first time resolution should always be the aim, reducing the amount of times people need to tell their story and gathering all the information needed to resolve their issue.
3. **Always be clear about expectations and keep customers in the loop** – letting a customer know how long things will take to complete and keeping them up to date throughout reduces unnecessary contact and ensures the customer is clear about what is happening at every point.

# Centralised front door / triage and signpost

Despite the variety and complexity of the organisation, having a single funnel for initial access makes engaging with the council clear for customers and it supports the organisation to get on with the roles they are responsible for. The image below shows how for initial contact the front door is able to deal with and triage work so that only work that needs their attention gets into their work queues. This is the best way of achieving resolution in one contact which is a key outcome of this strategy.



## Access principles outside the front door

There will be a few services which fall outside of the centralised front door approach where there is a solid business case. The remainder of the principles and channel objects set out in this strategy apply to these cases and where systems can be joined this prevents these cases creating totally separate interactions which are not linked to the rest of the organisation.

## Systems

In order to make the most of the centralised front door approach it needs to be supported by the right systems; over time a more siloed system architecture has formed which makes a single view of the customer more challenging. The corporate CRM system (EM Pro) has been upgraded so this can be the main view of customers, the upgrading of online forms to this platform will give greater visibility of customer interactions in one system. The ambition is to reduce the overall number systems in use especially for initial customer requests and ensure that systems in use outside the CRM are linked to there is some visibility. We aim to create the best overall view of the customer to improve customer service.

Outcome/focus	What do we want to achieve?	How will we achieve this?
Reduced number of access points to the council	Simpler approach to accessing services	Centralisation and a front door approach
The correct activity taking place within the front door	Map processes and customer journeys to establish the best location of activity	Moving appropriate work into the centralised front door leaving delivery teams to focus on complex and special cases
Better view of the customer	Better overview of each customer's interaction with the council	Data cleaning, system rationalisation, system integrations
Reduced number of contact points needed to resolve the customer's need	Customers need to speak to fewer teams or individuals in order to resolve their initial	Centralisation where teams are equipped to deal with the majority of cases without passing on
Only complex issues making it to specialists	Not wasting time of professionals with low level / irrelevant enquiries	Training and appropriate triage taking place in the front door.
Clear understanding on the process	Management of expectations early	Explaining the next steps and likely timescales at the earliest opportunity



## Choice of channel and location

- Customer service is an ever-evolving area and customer preferences change over time, to provide high quality customer experiences the way that services and information can be accessed need to be continually reviewed.
- The next page includes a channel approach which sets out a current and target position for all current channels, having a consistent approach across the organisation is required to achieve the overall customer experience we are aiming for. While choice is important each channel must be reviewed on its merits, considering the business and customer impact.
- Customer research through the City Survey on channel preferences shows that the two most popular channels to contact local public services are telephone (46%) and website (43%), with telephone having fallen by 14 percentage points since 2018 and website increased by 11 in the same time. Email is the next most popular with 33% and then it drops off with social media accounting for a combined 10%.
- The location face to face services are delivered is an important consideration and there is work underway to establish greater locality working developing and changing the way we work, moving away from the more traditional approaches to ensure services are designed and evidenced from those needs of residents to enable prevention / early intervention and to target specific areas of need ensuring they are innovative in their delivery.

<b>Outcome/focus</b>	<b>What do we want to achieve?</b>	<b>How will we achieve this?</b>
The right access channels	Giving our customers choice over how they access council services or information	Regular customer research to understand changing preferences, both at the whole council level but also on a service by service basis. The customer experience team will also stay up to date with industry trends to ensure we are aware of upcoming opportunities and challenges.
Well managed channels	Each channel having an owner who looks at usage data, customer feedback and other information to make continues improvements.	The customer and communications service own the corporate customer contact channels and have a lead person for each who is responsible for planning and development.
Getting the right mix of channels for each journey	As customer experiences are reviewed and improved it is important to evaluate if the right mix of access channels are available.	The work of the Customer Experience Programme will map and review customer journeys but also set the process for continuous improvement where this can be considered.
Locality working	Ensuring that services are delivered at the right location for customers	There is work ongoing to establish the best model of service delivery so that customers can access services near to them
Customer feedback on channels	Regular and reliable customer feedback on access channels	Ensuing point of contact surveys are in place and regularly reviewed.
Channel shift	Customers using the most appropriate channels for their needs	Signposting and support for customers to access digital channels.

# Channel approach

To set out the strategic customer access objectives it is crucial to have a clear plan for each channel

	<b>Current position</b>	<b>Target position</b>
<b>Website</b>	Main channel of choice to meet information requests, begin service requests and get information and updates on services	Build on existing strengths and increase usage from both new and returning visitors. Also increase the number of sessions which need no further follow-up interaction.
<b>SOBOT</b>	Well used and trained to cover a significant amount of the council.	Trained in a wider number of areas so can answer questions on most topics, able to hand over to human operated webchat if unable to answer. Able to capture case data and create a case within the CRM.
<b>Webform</b>	The principal approach for requesting a service, reporting an issue on a number of platforms at present	On one platform, well designed with intelligent routing and integrations with back office systems.
<b>Webchat</b>	A useful channel for keeping people online, supporting more complex issues and creating a feedback loop to improve digital services	Wider availability, used to access professionals like social workers or planning officers for technical questions etc.
<b>Video call</b>	Not used with external customers	Used for case work conversations to reduce the need for travel where appropriate
<b>Social media</b>	Necessary for reputational management, fine line between responding and dealing with issues and signposting to the online route. Increasingly an area for complaints to be raised.	Continued as is, with proactive support for self-service interactions. Capture more detail of issues within CRM to support reporting and MI.
<b>Email</b>	A few customer facing generic email addresses in place, significantly reduced over time.	A broadly inefficient channel that should be discouraged, not good for customer or business. Phasing out of email addresses and replaced with forms / webchat.
<b>Customer account</b>	Currently a disjointed picture, with many service areas have their own accounts, as a principle accounts solves issues for the business rather than the customer. Legacy IT and siloed systems drive the use currently.	Reduction in accounts overall and where there is a strong business case, those that meet this threshold need to deploy open authentication standards and a joined-up approach.
<b>Telephone</b>	A channel of choice by customers, effective for first time resolution and is the natural second choice of most digital customers alongside being the default for many.	Still an available option which is straightforward to access for customers who need to gain support.
<b>Letter</b>	Minimal level of customer mail received now.	No inbound mail requests or payments.
<b>Face to face (drop in)</b>	Still important to support vulnerable customers and complex situations.	A more community based approach would reduce barriers to access, targeted to serve the most vulnerable.

# Reducing unnecessary contact

Part of getting access right, is the need to ensure customers are accessing services when they need them. We waste resources when customers contact us to chase things that are happening. Part of being effective at customer service is preventing avoidable contact so resources can be targeted to delivering first time resolution and supporting vulnerable customers.

To reduce unnecessary contact the inbound access approach needs to be supported by proactive communication with customers to prevent failure demand and ensure they are clear where they are in the process and what is happening next. This can be achieved via the following:

<b>Text message</b>	A really useful channel for specific and targeted purposes, appointment reminders, helping people to access information on their mobile device
<b>Email update</b>	Helpful in keeping a customer up-to-date on the progress of a request or report. The right frequency is important with clear info on what happens next and when / what to do if there is a change.
<b>Email bulletin</b>	Generic information about changes or services which help drive contact in the right way and avoid unnecessary contact
<b>Phone call</b>	Outbound calls are useful to help early intervention and where other channels are less effective or haven't worked.
<b>Face to face visit</b>	This mainly forms part of an ongoing support arrangement.

The website can also be used to provide clear information for people to refer to before or after their interaction that sets expectations around when they will receive a response and via which channel.

<b>Outcome/focus</b>	<b>What do we want to achieve?</b>	<b>How will we achieve this?</b>
Reduce number of calls chasing	Fewer unnecessary contacts	Proactive updates and clearer SLAs stated upfront and in any confirmation emails/other comms; review comms to make sure they are in plain English with key information clearly highlighted.
Missed/moved appointments	Reduction in missed appointments	Clear process for rebooking and appointment reminders for all appointment based services.
Reducing calls about issues we already know about	Less reactive contact	Proactive communications via email and social media on issues we are aware of to reduce the amount of contact on these topics.

# Every interaction matters

An important part of getting customer service right is to ensure that each interaction counts, this is particularly true of a large and complex organisation such as ours where there can be many ways of accessing and a wide range of services. To make accessing any council service as easy and frictionless as possible every interaction or touchpoint needs thought and consideration of the whole journey.

<b>Outcome/focus</b>	<b>What do we want to achieve?</b>	<b>How will we achieve this?</b>
Enquiries going around the houses	Easier interactions and navigation of services for residents	Improve knowledge of the organisation so employees are better equipped to take ownership and effectively signpost.
Clarity of how to access services	Customers aware of their choices	Communications about options and employees aware of options and able to explain to customers options and benefits.
Suggesting relevant services	Better connections between linked services	In the design of our online services we can start to introduce suggestions and recommendations – ‘people who did this found x helpful too’ building connections between services and improving customer journeys.
Better view of the customer	An improved understanding of how multiple services are accessed and trends in use	Through the work of the Data Strategy but linking systems and designing the right architecture an improved and more joined up view of the customer will be possible.
Well-designed customer journeys	Easy access which is supported by through end to end journeys	The work of the Customer Experience Programme will map and review customer journeys but also set the process for continuous improvement where this can be considered.

## Action plan

In order to improve the customer experience for individuals using council services the following actions will be delivered.

Outcome/focus	Target	Timescale
Customer focused culture	Roll out a programme of training and interventions to increase the customer focus of the organisation.	Piloted in 2022 with development and roll out across 2022/23
Customer feedback	Development of an organisation wide approach to gathering feedback after any interaction with the council	Piloted in late 2022 with development and roll out across 2023/24
Access channels	Deliver the target position set out on the channel approach page of this document	By the end of 2022
Customer systems	Customer facing forms in CRM system	Online forms transferred to EM Pro by mid 2022
Customer updates	Implement automatic updates for customers to let them know by text or email when the status of their request changes	Initial services build in 2022 and rolled out to all high-volume journeys by 2024
End to end mapping of customer journeys	The Customer Experience Programme is mapping end to end customer journeys and applying the design principles	This is an ongoing activity but a central record of the highest volume 50 should be kept by the Customer Experience Team and used to inform ongoing improvement activity.
Continuous improvement	Once the Customer Experience Programme is complete this will lead to a culture of continuous improvement coordinated by the central Customer Experience Team but supported by all departments.	The Customer Experience Programme will run into 2023 and will have set up processes and reviews of many high-volume service areas. From then on a cycle of review and tweaking will continue using customer feedback and data to support further improvements.
Better view of the customer (joining up systems)	To have all key customer systems linked so there is an understanding of the different services individuals access and to add value to interactions with the council.	By fully utilising the Customer Relationship Management system and working with the Data Strategy to build an approach to a better view of the customer. Piloting work will happen in 2022 and will be rolled out from there.

## Delivering our strategy

- The Customer Experience Programme will be central to achieving the aims and targets of the Customer Access Strategy outcomes by working with services on designing their services in a customer focused way and by bringing the necessary improvements to digital channels.
- Mapping customer journeys and understanding each touchpoint is vital in shaping the customer access approach
- The principles will be applied to all transformation activity to ensure that all activity supports the customer access objectives.
- It is the important that all services and change programmes are aligned with the principles and objectives to ensure consistent progress towards the overall aims of this strategy.
- There has been significant progress in improving the customer focus of the organisation over the last few years this strategy is about taking this work to the next level.

## Link in with existing plans and strategies

- The objective to achieve a better view of the customer is a shared objective with the Data Strategy
- The systems approach forms part of the IT strategy
- This work links closely with the development of a new digital vision to ensure there is support for residents to access digital channels and have the confidence and skills to make the most of opportunities
- Improve the customer experience through developing a greater customer service focus, supporting the improvement in digital literacy in the city, and improving and expanding services available online. Is an outcome of the corporate plan, getting the correct strategic approach to customer access supports and enables delivery of this.

