



COUNCIL EXECUTIVE

DEVELOPING A CUSTOMER SERVICES STRATEGY

REPORT BY HEAD OF AREA SERVICES

A. PURPOSE OF REPORT

To advise the Council Executive of the development of a Customer Services Strategy for the Council.

B. RECOMMENDATION

The Committee is asked to:

- 1) Agree the Customer Services Strategy for West Lothian Council, and
- 2) Note that the Modernisation Programme Board will oversee the implementation

C. SUMMARY OF IMPLICATIONS

I Council Values	Focusing on our customers' needs Being honest, open and accountable Providing equality of opportunities Developing employees Making best use of our resources Working in partnership
II Policy and Legal (including Strategic Environmental Assessment, Equality Issues, Health or Risk Assessment)	Equality Impact Relevance Assessment carried out. Further EQIA will be carried out on specific actions within the Strategy
III Implications for Scheme of Delegations to Officers	None
IV Impact on performance and performance Indicators	Activity associated with the Strategy should improve Customer Service performance
V Relevance to Single Outcome Agreement	Outcome 15
VI Resources - (Financial, Staffing and Property)	The Strategy will be delivered within existing resources, although the prioritisation may change.

VII Consideration at PDSP	28 October 2011
VIII Other consultations	Staff and customers have been involved in developing the Strategy. The Councils Corporate Management team commented on the draft on 28 Sept 2011. Community Councils have been consulted.

D. TERMS OF REPORT

Background

West Lothian Council developed a Customer Services Strategy in 2006 which set out the direction of travel for developing customer services in the short to medium term. The Strategy was due to be reviewed in 2009. Following various restructuring within the Council, the responsibility for Customer Services now falls within the Area Services remit.

A key area of work within the Area Services Management Plan for 2011-12 is the refreshing of the Customer Services Strategy. We had undertaken to have this fully developed by the end of 2011. It is envisaged that the Strategy will be a succinct document – Appendix 1- with a comprehensive action plan as a separate document - Appendix 2.

Discussion

The Customer Services Strategy is an integral part of a suite of strategies (see page of draft strategy) that in the round will ensure that we have customer service at the heart of service development. This is within the context of reducing resources and a need to move customers to more effective and efficient service delivery channels.

The Customer Service Strategy will ensure our customers, stakeholders and partners are informed about the quality, standards and choice of services available and will empower their participation in the delivery and review of service provision. The Strategy has been developed around 4 themes;

1. Customer Involvement – Our customers are involved in designing, monitoring and evaluating our services
2. Excellent Customer Service – All council services will ensure that customer requests and enquiries are dealt with in a timely, efficient and professional way
3. Improving Access – Our customers are able to access council services in the way most convenient to them
4. Transforming Services – We will change the way we deliver services to ensure our customers journey from start to finish is made by the best route possible

The Strategy has been informed by both staff and customers. A newly created Customer Services Champions Group, chaired by the Head of Area Services, has developed the themes and actions within the Strategy. Customer focus groups have been held with members of the Citizens Panel, tenants network and parent councils to develop the key issues that need to be addressed. A report on this engagement is attached as appendix 3

The Partnership and Resources PDSP on 28 October 2011 agreed that the draft Strategy should be shared with all Community Councils for comment. This was done and at the time of writing this report, one response had been received. The response made some practical suggestions how communication between community councils and the Council could be improved. The PDSP also asked that the full action plan be shared with the Council Executive.

The Corporate Management Team has agreed that the governance and delivery of the Strategy will be overseen by the Modernisation Programme Board. The action plan has been developed with clear outcomes, targets and deliverables against each of the four themes above.

The Plan will be monitored and adapted over the lifetime of the Strategy (2011-14). The actions have been prioritised and detailed implementation plans are being developed.

The Strategy in Appendix 1 is aimed at managers and staff within the Council. A summary document is being developed for customers, highlighting the main themes and standards we would expect to achieve. The Tenants network is helping with the creation of this to ensure it is customer friendly.

Further work is being undertaken to explore opportunities to align our key customer service initiatives to those of the main Community Planning partners in West Lothian. This will again seek to improve customer service and create efficiencies.

E. CONCLUSION

The Strategy will support the delivery of outcomes for West Lothian citizens by ensuring that we design, deliver and improve services based on customers' needs. The key thrusts of the Strategy will ensure we;

- deliver high quality services supported by a 'can do' attitude at all levels;
- achieve better corporate working and improve service co-ordination;
- improve operational efficiency and minimise overheads;
- exploit the business improvement opportunities presented through the ongoing development of new technology; and
- fully value the contributions of our staff , customers and partners.

F. BACKGROUND REFERENCES

Customer Services Strategy 2006-2009

Appendices/Attachments: Draft Customer Services Strategy 2011-14
 Customer Services Strategy Action Plan
 Report on Customer Focus Groups

Contact Person: Karen Cawte, Customer Services Development Manager
(*Name of responsible CMT member*) Alistair Shaw – Head of Area Services

Date: 10 January 2012

Appendix 3

Developing a Customer Services Strategy for West Lothian Council

Results from Customer Focus Groups

Background

West Lothian Council wanted to update its Customer Services Strategy to ensure that the Council was focusing on the right things in order to deliver excellent customer service in the coming years in a climate of reducing resources. The Strategy is to cover the time period 2011-2014.

The Customer Services Development Manager was asked to lead on the development of a new strategy, working with a cross council group the "Customer Services Champions". Integral to the development of the Strategy was the engagement with customers about customer service within and from the Council. The Council prides itself on being inclusive in its decision making and service development, so it was natural that customers would be at the heart of this process.

Methodology

It was agreed that the best way to engage with customers on the strategy development was to use face to face dialogue to ensure that themes could be pursued and dissected. It was felt that Focus Groups was the best methodology to achieve this aim.

Using the Citizens Panel (a West Lothian wide group of 2900 people who regularly comment on Council Services), a random sample of 300 people was drawn and these were invited to attend one of 3 sessions. The sessions were designed to be in different parts of the county – Uphall, Bathgate and Livingston, and at different times of the day – morning, afternoon and evening. This mix of days / times was to try and ensure the maximum numbers of people were able to attend.

In addition, the Tenants network offered to facilitate both a large group discussion and a smaller more focused discussion around the key issues. These took place in Uphall and Blackburn.

The engagement activity took place during August and September 2011. Time constraints for developing the Strategy did not allow for a long customer engagement period.

Information during the discussions was captured using mind mapping techniques captured on large pieces of paper. This allowed discussions to flow, but also showed the inter-connectedness of the issues. The information from these sessions is reproduced in appendix 1.

A draft of the Strategy was shared with participants and further feedback gathered.

Results

From the 300 invitations to Citizen Panel members, 21 people expressed an interest in attending one of the 3 sessions. In addition, the Tenants network had 20 people at the first session and then 5 at the second session.

The discussions were themed around four areas; involving customers; excellent customer service, improving access and transforming services. Views and discussions based on their own experience helped to inform key areas for development under each of these themes. Across the five sessions there were common issues arising which are reproduced below.

Involving customers

- Customers are interested in being involved
- They want to be part of the solution
- We should use customer feedback from a variety of sources to improve services
- The Council needs to be honest and tell them what is not working as well as what is.
- Customers should be able to participate at a level that is comfortable to them
- Some customers may need support to enable them to be involved
- If customers take the time to get involved, we need to tell / show them how their contribution has made a difference. Council Bulletin is a great medium.

Excellent customer service

- Empower staff to be able to deal with issues
- Consistent staff training is vital
- Staff need to take ownership of customer issues
- Letters sent to customers should be in Plain English and easy to understand
- We should honour our service standards, and tell people when there is a delay in responding.
- Customers and staff should be involved in setting standards.

Improving access

- Still need face to face contact. Staff need to be based in communities.
- Some things can be done on-line, but it needs to be easy and straightforward
- Phone system needs to work better – too much waiting around for the “options”.
- Navigation of website poor
- Help people to change the way of doing things – need to train customers. Use Libraries and CIS to do this.

Transforming services

- We need to be more responsive to customer needs
- Invest in technology now – but hard to future proof
- We should not make promises we cant keep
- We need to exceed customer expectations – which means staff need to be motivated to deliver excellent customer service
- We need a variety of ways customers can contact us

Feedback

All the comments and suggestions gathered through the discussions have been used to inform the priorities in the draft Customer Services Strategy 2011-2014.

Members of the Focus Groups were asked how they wanted to learn about what their comments had been used for. All asked to see a copy of the draft Strategy, and a copy of this report. In addition, the Tenants Group asked that the Customer Services Development Manager went back to their network meeting and talked about how the comments had been taken on board. This was arranged for the October meeting.

Other members of the Focus Groups were given the opportunity to attend a further meeting to discuss the draft strategy, as well as giving any written comments.

National Standards for Community Engagement

The engagement around the Customer Services Strategy was planned and delivered using the National Standards for Community Engagement. Using the VOiCE (Visioning Outcomes in Community Engagement) tool the exercise was evaluated. Further feedback about the process was gathered from the second phase meetings with customers.

Standard	Score	Comment
<i>The involvement standard.</i> We will involve the people and organisations with an interest in the focus of the engagement	3.5	Customers were the focus of the engagement – they were involved. We could have involved more customers had time allowed
<i>The support standard.</i> We will identify and overcome any barriers to engagement	3	Meetings were arranged at different times and venues to increase participation. Help was given to the tenants to enable them to engage
<i>The planning standard.</i> We will gather the evidence of the needs and available resources and use this to agree the purpose, scope and timescale of the engagement and actions to be taken.	3	The engagement was planned with staff from different disciplines. With more time, other existing customer groups could have been included

DATA Label - Public

<i>The methods standard.</i> We will agree the methods of engagement that are fit for purpose	3.5	We chose focus groups because we wanted to have dialogue with customers and tease out and explore issues
<i>The working together standard.</i> We will agree and use clear procedures to enable participants to work with one another efficiently and effectively	3.5	The procedures during the focus groups were clear and recording the conversation using mind mapping was transparent. Feedback methods were agreed with participants
<i>The sharing information standard.</i> We will ensure necessary information is communicated between participants	4	All information has been shared with participants
<i>The working with others standard.</i> We will work effectively with others with an interest in the engagement.	3	There are customer groups who have not been involved in this process due to time constraints.
<i>The improvement standard.</i> We will develop actively the skills, knowledge and confidence of all the participants	2.5	The focus of the engagement activity was not around the capacity building of our customers. Although their continued engagement may be sought to support citizen led inspections and then capacity building will be a key activity
<i>The feedback standard.</i> We will feedback the results of the engagement to the wider community and agencies affected.	4	Feedback sessions have been held. All participants have received copies of the reports. Information will be reported through Council committees that are open to the public.
<i>The monitoring and evaluation standard.</i> We will monitor and evaluate whether the engagement meets its purposes and the national standards for community engagement.	4	The NSCE have been used to monitor and evaluate the activity. Customers have had the opportunity to comment on the process.

Customer comments on process

All customers that took part in the Focus Groups were sent copies of this report and the draft strategy. They were given the opportunity to comment either by email, completing a questionnaire and sending it back via post or attending a further focus group. In addition the Customer Services Development Manager presented the results at a tenants housing network meeting. Customers were generally happy with the process and felt that their comments etc had been listened to and planned for in the Strategy.

Lessons learned from the process

A longer timeframe would have allowed more customers to be involved in the process, particularly customers from "equalities" groups that may have specific needs. Some of these will be picked up during the Equality Impact Assessment.

Whilst it was extremely valuable to access the tenants network, other Council service customer groups could have been accessed with the support of relevant staff.

Other methods of engagement such as a web-based questionnaire may have given us access to a variety of other comments, although it would not have been possible to get an in-depth view of these. It may be possible to undertake such a survey before the Strategy is launched to gather baseline data

Customer Service Strategy Citizen's Panel Session Thurs 18 Aug 1pm to 3pm Livingston

Summary of Main Points

- Face-to face
- Local IT/web access points
- Speak to someone who can help me
- Link between customer and service
- Ownership/responsibility
- Right people/right training
- Walk-up/provide service/get service
- Exceed expectation.

Customer Service Strategy Citizen's Panel Session Mon 22 August 10am to 12 Uphall

Summary of Main Points

- Still want offices
- Face-to face
- Want to feel we are human beings and be treated like human beings
- Local IT/web access points
- Speak to someone who can help me
- Link between customer and service
- Ownership/responsibility
- Right people/right training
- Walk-up/provide service/get service
- Exceed expectation.

Customer Focus Group – Bathgate 6pm-8pm Wed 24 August 2011

Summary of main points

- Staff need empathy, be customer orientated and competent.
- Answer the question first time
- Invest in staff training
- Involving customers
- Need to empower customers to do things for themselves
- Feedback to customers on actions taken
- Some people want to get involved , others don't
- Using volunteers is possible to deliver services, but need training
- Need to invest in technology as this is what young people use
- Website information could be improved
- People still want to speak to a person

Customer Focus Group –Blackburn 10am to 12 noon Fri 2 Sept 2011

Summary of main points

- Staff should take ownership of an issue
- Can we have a form for complaints as the points of view doesn't work.
- Need internal customer service standards
- Call centre need to change the options so you can leave a voicemail straight away
- Need a variety of methods
- Interface with new IT systems
- Still need face to face
- Staff should be based in communities
- Keep promises
- Involving people
- Customer expectations are not unrealistic , they want to be kept informed.