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<b>Report To:</b>	<b>Policy &amp; Resources Committee</b>	<b>Date:</b>	<b>15 September 2020</b>
<b>Report By:</b>	<b>Chief Financial Officer</b>	<b>Report No:</b>	<b>FIN/73/20/AP/LA</b>
<b>Contact Officer:</b>	<b>Anne Marie Locke</b>	<b>Contact No:</b>	<b>01475 712596</b>
<b>Subject:</b>	<b>Customer Services - Annual Performance Report</b>		

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## 1.0 PURPOSE

- 1.1 The purpose of this report is to provide the Committee with an update of Customer Service Centre (CSC) performance for 2019/20 and to provide an update on the current Action Plan approved as part of the 2018-21 Customer Services Strategy.

## 2.0 SUMMARY

- 2.1 Following the opening of the Customer Service Centre (CSC) in the summer of 2012, the Policy & Resources Committee agreed to the development of a 3 yearly Customer Service Strategy. The latest Strategy covers 2018-21. The Committee also agreed that an update of CSC performance would be presented to the Committee annually.
- 2.2 Since last year's performance report, a temporary change has taken place in Revenues and Customer Services due to the Customer Services and Revenues Manager post becoming vacant in February 2020 with the Customer Services Team Leader taking on additional duties during the interim period until a decision is reached on filling the post.
- 2.3 Appendix 1 details progress against the action plan presented to the Committee in September 2018 and Appendix 2 provides performance information for 2019/20 as compared to 2018/19 in terms of volumes and throughput. Overall the level of performance in both Revenues and Benefits and General enquiries has improved and exceeded the targets set whilst overall there has been a reduction in customer contacts. More information relating to performance can be seen at Section 6 of this report whilst Appendix 3 shows the trend over the last 5 years.
- 2.4 Section 7 of the report identifies targets for 2020/21 which are included in the Corporate Directorate Improvement Plan and Inverclyde Performs. This section also outlines the challenges ahead including ongoing work to drive forward channel shift.
- 2.5 The Covid pandemic will have an impact on performance in 2020/21 in terms of both volume and the nature of enquiries. The experience from the pandemic and the different ways of serving customers which evolved throughout this period will feed into a refreshed Customer Services Strategy which is due to be presented to the Committee in September 2021.

## 3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Committee notes the improved performance in terms of call answering for Revenues and Benefits and General enquiries in 2019/20 and welcomes the high level of compliments received.
- 3.2 It is recommended that the Committee notes the positive progress made in continuing to deliver the CSC action plan and that a refreshed Strategy taking on board the experience of the Covid pandemic will be presented to the Committee in September 2021.

**Alan Puckrin**  
**Chief Financial Officer**

## **4.0 BACKGROUND**

- 4.1 The Policy & Resources Committee approved its first Customer Services Strategy in November 2012 following the opening of the Customer Service Centre in Clyde Square. This Strategy is refreshed on a triennial basis with the most recent being approved by the Committee in September 2018 for 2018-2021. The Committee also agreed that a report on Customer Service performance be presented to the Policy and Resources Committee on an annual basis after the Summer recess.
- 4.2 Since last year's performance report a temporary change has taken place in Revenues and Customer Services due to the Customer Services and Revenues Manager post becoming vacant in February 2020. Since that time the Customer Services Team Leader has led the service.

## **5.0 2019/20 PERFORMANCE AGAINST THE ACTION PLAN**

- 5.1 Appendix 1 details the updated Action Plan. This Action Plan has been updated to show the current position; Appendix 1 refers and shows:
- 5 x Blue (completed actions)
  - 5 x Green (on-track actions)
  - 1 x Amber (slippage)
- 5.2 The Council's Customer Relationship System (CRM) has been developed during 2019/20 to allow on line applications for Green Waste Permits. The technology developed will now be rolled out to include other services such as Bulky Uplifts, Pest Control and Street Lighting to be reported and where required booked and paid for on line. Promotion of these services through the use of media and encouragement by the Customer Service Representatives during phone calls will be crucial in achieving a shift in the channel of contact by customers.

## **6.0 2019/20 PERFORMANCE**

- 6.1 Appendix 2 contains a comparison of performance for Revenues & Benefits (R&B) enquiries for 2019/20 against the same period for 2018/19 for telephony, customers interviewed and incoming emails. The Management Information (MI) illustrates that call volumes have reduced by 23% with the abandoned call levels improving from 18% in 2018/19 to 6% in 2019/20 which is well within the target of 20%. This is a credible performance given the high turnover in the team during 2019 as it takes a few months of intensive training before new advisors are fully operational.
- 6.2 The average time that customers had to wait for their call to be answered in 2019/20 increased from just over 1 minute in 2018/19 to 1 minute 45 seconds in 2019/20. The number of customers interviewed decreased by 7% in 2019/20 compared to a 3% reduction in 2018/19. Introduction of Citizen Access Revenues (CA-R) in January 2020 allowed the public to manage their council tax online and although there is only a small uptake to date, it has reduced a portion of contact normally absorbed at the CSC. The housing benefit caseload has also continued to drop year on year with a reduction of 8% for 2019/20. There has also been increased access to DWP data and increased automated updates for housing benefit and council tax reduction claim maintenance, reducing the need for customer contact.
- 6.3 Appendix 2 also contains a comparison of performance for Other Council Services from 1 April 2019 to 31 March 2020. This shows:
- The abandoned call level has reduced significantly from 6% in 2018/19 to 3% in 2019/20 with performance being within the target of 7%. This is a credible performance given that two full time posts were taking as savings throughout the year.
  - The number of overall calls presented has dropped slightly by 8%.
  - General enquiry emails increased by 39%. This is an encouraging move; customers can make contact at a time that suits their lifestyle rather than being restricted to

opening hours of the CSC.

- The total contact for general enquires reduced by 4% and whilst the use of the mobile app and website has reduced, a new channel via the upgraded CRM saw over 6000 transactions/enquiries relating to Garden Waste Permits. This 24/7 access to transact with the Council will continue to be developed during 2020/21.

- 6.4 Appendix 3 shows the changes in the key metrics in the period since 2015/16. From this it can be seen that there has been a significant reduction in calls received partly offset by an increase in digital contacts. This is in line with the Customer Services and Digital Strategies.
- 6.5 Targets are set for the CSC in respect of volumes of complaints and compliments; the target for 2019/20 was based on the outturn for 2018/19. The target for last year was that the CSC was to receive no more than 20 complaints and to receive in excess of 70 compliments. The outturn for 2019/20 was that 17 complaints and 82 compliments were received. The nature of the complaints varies with no emerging theme; the high number of compliments received is testament to the knowledge and professionalism of the CSC staff.
- 6.6 It was reported to the Committee in September 2019 that the Quality Monitoring System was being used to assess the accuracy of telephone calls and broken down in to 4 main areas: Revenue and Benefits, Environmental and Public Protection, Taking a Payment and Switchboard. The process involved a Senior CSR listening to a percentage of calls and applying a scoring matrix.
- 6.7 Previously quality monitoring focused mainly on the quality and accuracy of information provided during a call, CSC staff excelled at this and the logical next step has been to focus on the finer aspects of call handling.
- 6.8 The new forms concentrated more on quality details such as, updating databases 100% of the time; how calls were transferred and whether call handle times were appropriate to the specific enquiry. It was anticipated that through appropriate training, performance levels will assist in achieving with the overall aim of attaining excellence and uniformity in how the team delivers all aspects of the service.
- 6.9 During 2019/20 a more robust process was implemented for recording individual call performance and using a more targeted approach to coaching or training, potentially resulting in escalation if the individual continues to fall below the required standard of performance. The quality performance in 2019/20 was:
- Revenue & Benefits – 76% (89% in 2018/19)
  - Environmental & Public Protection - 84% (87% in 2018/19)
  - Taking a Payment - 93% (94% in 2018/19)
  - Switchboard - 93% (93% in 2018/19)
  - Birth Registration - 72%

## **7.0 FUTURE PLANS AND TARGETS**

7.1 The Covid pandemic will have an impact on performance in 2020/21 in terms of both volume and the nature of enquiries and this explains why a number of targets are lower than the 2019/20 performance.

7.2 Customer Services targets for 2020/21 have been set as:

- To have fewer than 26% abandoned R&B telephone calls – 20% target last year
- To have fewer than 10% abandoned general calls – 7% target last year.
- To receive no more than 20 complaints – 17 were received in 2019/20 compared to 20 received in 2018/19
- To receive in excess of 80 compliments – 82 were received in 2019/20 compared to 96 in 2018/19
- To have 10% of interactions with the Council without intervention at the CSC by utilising the upgraded CRM, web or mobile app for self-service in respect of general enquiries and service requests.

7.3 Channel Shift continues to be a key priority for the Service and the following actions will help facilitate this:

- Work with suppliers to fully enable the functionality for customers to book and pay for bookable and transactional services such as bulky uplifts.
- Enhance the range of services available via Web Self-service, including integration of MyAccount authentication which would allow one secure sign in.
- Review and revise the range of services available via mobile devices to provide a wider choice as we transition from the Inverclyde Online smartphone app and continue to improve back end processes and more widely promote this channel of contact.
- Work with suppliers to enable Council Tax account administration such as reporting changes in circumstances via the Council website.

7.4 Progress on the above channel shift actions are tracked through the Digital Strategy Action Plan, progress on which is reported to the Committee 3 times per year.

7.5 The CSC has continued to enjoy successful outcomes through the placement of Modern Apprentices (MA). Working in the CSC gives young adults a wealth of experience as well as confidence through dealing with different types of customers on the telephone and face to face. The CSC has proven history of developing MAs enhancing their employment opportunities within and external to the Council. In 2019/20 one MA secured a position as a Customer Service Representative (CSR) in the CSC with the other MA moving to a role within HSCP. As well as it being of great benefit for the individuals receiving training and mentoring throughout the MA process enhancing their chances of employment, the CSRs and senior CSRs are delighted to see results of their investment. The Service was fortunate to be allocated another MA this year.

7.6 Welfare Reform continues to have an impact on the volume and nature of contacts with the Customer Service Centre. The pace of this change will increase over coming years as Universal Credit begins its migration of the current Housing Benefit case load to UC albeit the pace of change has slowed down with full migration now not expected to be complete until 2024. The effect of UC will continue to be closely monitored.

7.7 It was reported to the Committee last year that Customer Service staff have been taking telephone calls in relation to the registration of births since June 2019 which has been a success. Upgrades to the booking system remain outstanding and is being progressed through the Digital Access Agenda. Once implemented further training in a modular basis will result in a transfer of the telephone calls regarding marriages and then death appointments. It is critical that this training is thorough due to the sensitivities and legislative requirements of registering births, deaths and marriages.

7.8 The SSSA now has a team of up to 4 members of staff co-located in the CSC; the team has been in place since the end of 2019. Once the team has completed its training the co-location in the CSC will allow customers to access Council and SSSA services in the one location with Health and Social Care Services also being available in nearby Hector McNeil House. Progress in this area will be monitored through the CSC Action Plan and by means of regular meetings with the SSSA and internal services in the Council.

## **8.0 CUSTOMER CONSULTATION**

8.1 No customer consultation was carried out in 2019/20 however there are biannual citizens panel surveys which include customer service questions with the next one due in 2020; it is planned that questions will be included around the area of website self-service in order to gauge awareness of these channels and collect information about how customers have found the experience of utilising on line services.

## 9.0 IMPLICATIONS

### 9.1 Finance

Financial Implications: There are no financial implications arising from this report

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

### 9.2 Legal

There are no legal implications arising from this report.

### 9.3 Human Resources

There are no direct HR implications arising from this report.

### 9.4 Equalities

There was a full equalities impact assessment carried out with the initial Customer Services Strategy which was updated as part of the refreshed CS Strategy presented to the Committee in 2018 and will be further refreshed when the Strategy is next refreshed in 2021.

Has an Equality Impact Assessment been carried out?

<input type="checkbox"/>	Yes	See attached appendix
<input checked="" type="checkbox"/>	No	This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required.

#### (b) Fairer Scotland Duty

If this report affects or proposes any major strategic decision:-

Has there been active consideration of how this report's recommendations reduce inequalities of outcome?

<input type="checkbox"/>	YES – A written statement showing how this report's recommendations reduce inequalities of outcome caused by socio-economic disadvantage has been completed.
<input checked="" type="checkbox"/>	NO

(c) Data Protection

Has a Data Protection Impact Assessment been carried out?

X

YES – This report involves data processing which may result in a high risk to the rights and freedoms of individuals.

NO

**9.5 Repopulation**

The provision of quality Customer Services to existing residents and potential residents plays a part in the retention and attraction of people to Inverclyde.

**10.0 CONSULTATIONS**

10.1 None

**11.0 LIST OF BACKGROUND PAPERS**

11.1 None

2018/21 Customer Services Strategy - Action Plan

Appendix 1

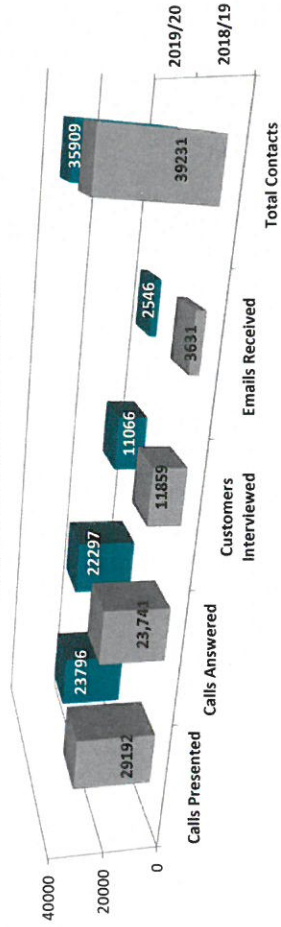
Action	Action	Success Criteria	Target Date	Responsibility	August '20 Position	Status
PEOPLE	Training needs will be identified from quality checking and appraisals	<ul style="list-style-type: none"> <li>*Training programme in place</li> <li>*Better trained and confident staff.</li> <li>*Better customer satisfaction</li> <li>*Completion of CSPQ</li> <li>*Staff understand expectations allowing resources to be correctly targeted.</li> <li>*Service delivery meets management expectations</li> <li>*Customer Service visions and outcomes are agreed</li> </ul>	Ongoing	CS Team Leader/CS Supervisor	<ul style="list-style-type: none"> <li>* 15 CSC staff have completed the CSPQ</li> <li>* Previous funding now ceased. HR are reviewing the funding position to see if the qualification can continue.</li> </ul>	
	British Sign Language plan 2018 - 2023. Support Corporate Policy with the implementation	<ul style="list-style-type: none"> <li>Meeting objectives in plan</li> <li>Better customer satisfaction</li> <li>Trained staff</li> </ul>	Ongoing	Corporate Policy Team/CS Team Leader	<ul style="list-style-type: none"> <li>* Consultation complete</li> <li>* HR will pilot Contact Scotland software before rolling out to customer services</li> <li>* Six CSC team members attended West College Scotland for full day BSL course</li> <li>* Five BSL courses that were scheduled for 2020 have been cancelled due to COVID 19 - Await confirmation from West College Scotland for the sessions to be rescheduled</li> </ul>	
	Keep abreast of developments in relation to the Scottish Social Security Agency (SSSA)	<ul style="list-style-type: none"> <li>Joint working with the SSSA and internal services such as HSCP in order to implement co-location.</li> </ul>	Ongoing	Revenues and Customers Services Manager/CFO	<ul style="list-style-type: none"> <li>* Four SSSA staff members now located in the CSC</li> </ul>	
CUSTOMER ENGAGEMENT	Use the website to communicate meaningful information to our citizens. Feed issues into the Corporate Web Group	<ul style="list-style-type: none"> <li>Customer satisfaction improvements - customer expectations are managed better when targets are understood.</li> </ul>	Ongoing	Revenues & Customer Service Manager	On Going	
	<ul style="list-style-type: none"> <li>*Develop Kana system</li> <li>*Implementation of web self service</li> <li>*Mapping integration for location based fault reporting with corporate GIS system</li> <li>*Develop further online payments</li> <li>*Revise the range of services available via the council website</li> </ul>	<ul style="list-style-type: none"> <li>*Increased range of services available via Web Self Service</li> <li>*Customers are able to book and pay for services online</li> <li>*Customers are able to conduct council tax administrative requests via the council website</li> <li>*Customers can access multiple services via a single sign on (MyAccount)</li> <li>*Reduces workload for customer services</li> <li>*Streamlines processes</li> <li>*Quicker service notification of new/updates to cases</li> </ul>	From Oct '19	Revenues & Customer Services Manager & ICT	<ul style="list-style-type: none"> <li>Green waste Permits moved on-line January 2020. Project back on track and next Services to be identified.</li> </ul>	
SERVICE DEVELOPMENT						

	CSR's to take appointment calls for marriages and followed by deaths	Calls handled by CSR's	Mar '20	Customer Services Team Leader & Registrar	*Birth Registration calls handled by CSR from June 19 *Await upgrade of Opti Time booking scheduler rather than using Outlook - this ties in with the Kana upgrade	SLIPPAGE
	Agree escalation process where individuals repeatedly fail to meet required standards.	*Improved customer service delivery *Improvement in scoring of individual's quality managed calls	On-going	Customer Services Supervisor/Support Officer	Procedure developed and implemented	COMPLETE
	Transfer of Registration Services to Customer Services	JD/SP for CS Supervisor to be developed and sent to job evaluation	End Aug '18	Revenues & Customer Services Manager	Complete	COMPLETE
	Transfer of Registration Services to Customer Services	Knowledge transfer of operational processes and legislation	Apr '19	CS Supervisor/Principal Benefits and Customer Services Officer	Ongoing	COMPLETE
	Development of citizen access for council tax	Reduces workload for customer services	Oct '19	Revenues & Customer Services Manager & ICT	* CA - R: Initial implementation complete - QA testing by service identified issues that prevented implementation. Upgrade from supplier is expected in October '19 to resolve these issues. Milestone chart currently being devised to identify launch date.	COMPLETE



	2018/19	2019/20
Calls Presented	29192	23796
Calls Answered	23741	22297
Customers Interviewed	11859	11066
Emails Received	3631	2546
Total Contacts	39231	35909

### Revenue's & Benefits MI

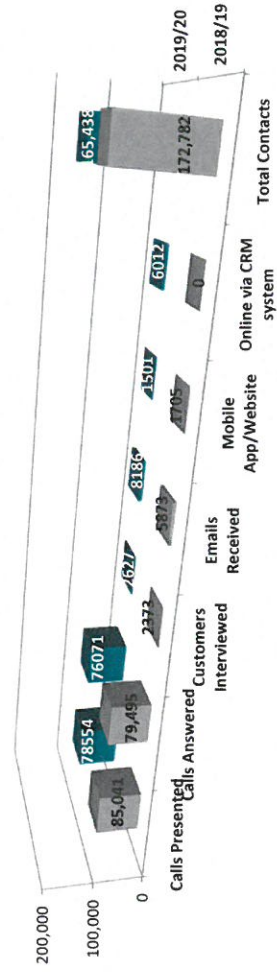


#### What does the MI show (annual)?

- \* Calls presented has decreased by 23%. This is largely contributed to by a 31% decrease in Housing Benefit calls
- \* Calls handed has increased this year achieving 94% handled calls.
- \* Customers interviewed has decreased by 7%
- \* Abandoned call level has decreased to 6% this year
- \* Housing Benefit emails received has decreased by 43%
- \* Total contacts have decreased by 9%

	2018/19	2019/20
Calls Presented	85,041	78554
Calls Answered	79,495	76071
Customers Interviewed	2373	2627
Emails Received	5873	8186
Mobile App/Website	1705	1501
Online via CRM system	0	6012
Total Contacts	172,782	165,438

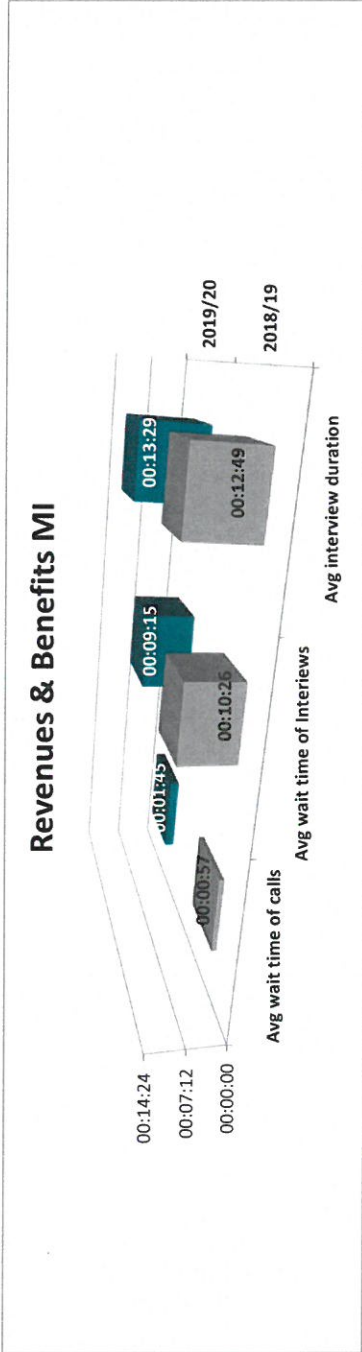
### Other Services MI



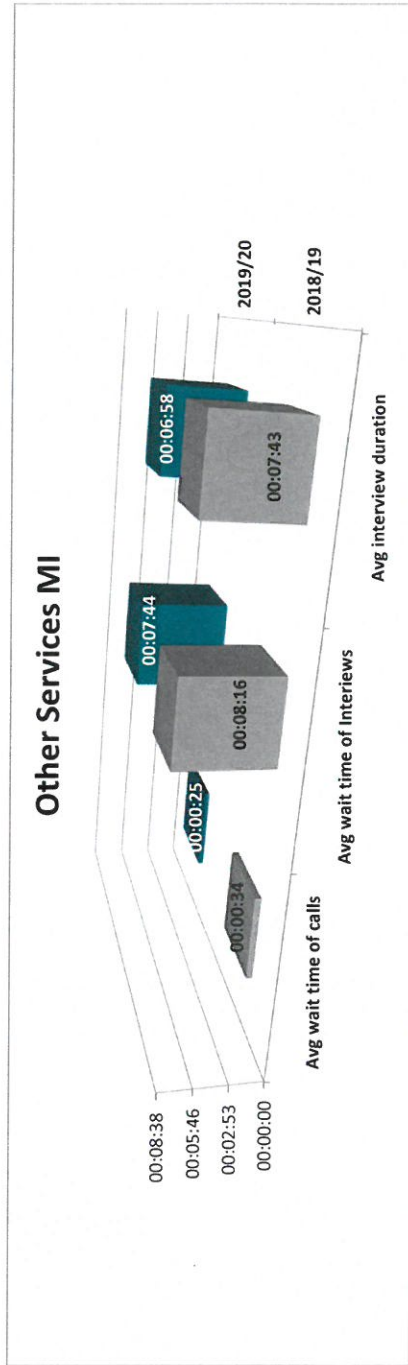
#### What does the MI show?

- \* Calls presented for all other non R&B services has decreased by 8%
- \* Calls handled for all other non R&B services has increased to 97%
- \* 3% of calls remain unanswered - this is an improvement to last year
- \* Interviews has increased by 11%. This is mainly the submission of free school meals and clothing grant applications.
- \* Emails have increased by 39%
- \* Total contacts has decreased by 4%. However a new channel via the use of on line services has opened up.

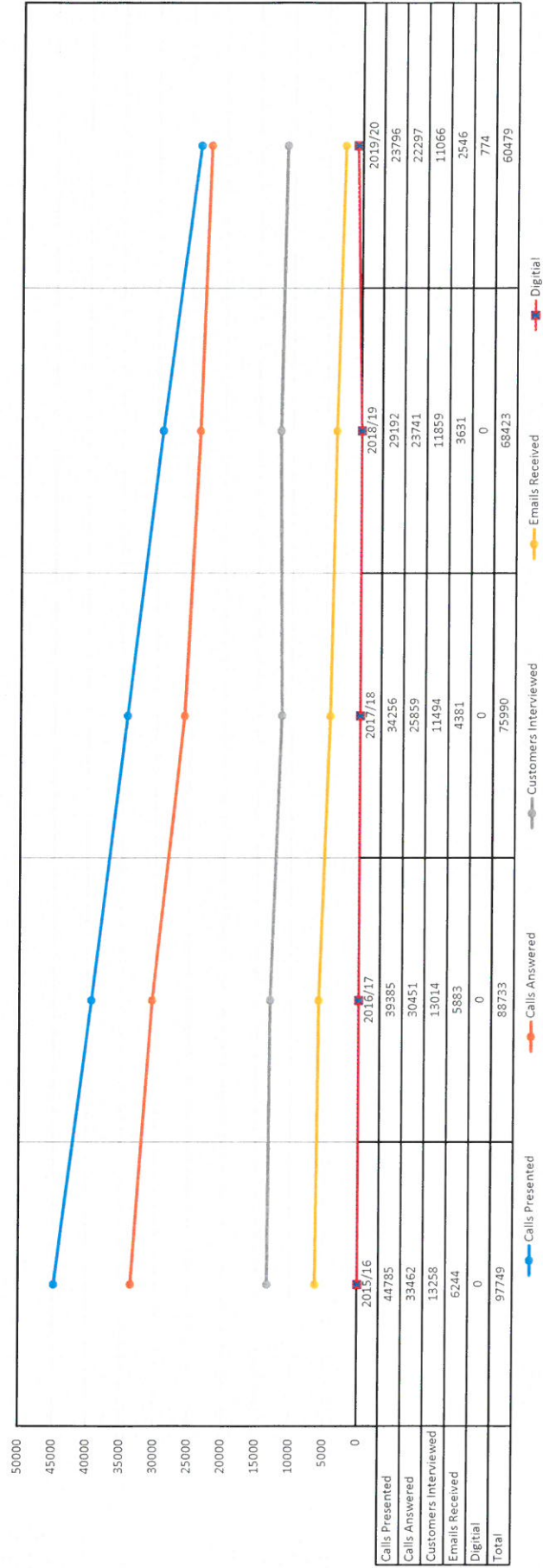
	Avg wait time of calls	Avg wait time of Interviews	Avg interview duration
2018/19	00:00:57	00:10:26	00:12:49
2019/20	00:01:45	00:09:15	00:13:29



	Avg wait time of calls	Avg wait time of Interviews	Avg interview duration
2018/19	00:00:34	00:08:16	00:07:43
2019/20	00:00:25	00:07:44	00:06:58



Revenue & Benefits MI



### Other Services MI

