BARNET
LONDON BOROUGH

# CUSTOMER SERVICES

## SERVICE DELIVERY

## Contents

# 1    VISION

## 1.1    OVERARCHING VISION

Our overarching service vision is one where Capita's support to Barnet extends beyond the NSCSO scope, enabling Barnet to be recognised as a Borough where the supply of services are owned by those who live and work here, and where citizens, staff, business and the community are aware of and participate in an environment of opportunity and success.

To achieve this we will enable citizens and customers to live in sustained and supported independence, as Insight allows people's individuality to be understood, recognised and reflected in getting the help they need, in the manner they need it and within the financial constraints they understand. Customers will become co-designers, shaping relevant and valued services as well as being willing partners in delivery, helping us to build on what already works in Barnet, working with existing organisations to improve their capacity, rather than creating our own. This allows us to provide the infrastructure to deliver a One Public Sector single solution through unified customer interaction and an integrated supply EcoSystem, extending beyond Council services to interaction with the wider public sector.

In the future the Council will be unique in the public sector, recognised as a business-led and truly customer-focussed organisation, all staff, suppliers and delivery partners feeling supported and informed as they work to achieve their best for citizens - whether that be through continually improving existing services or helping to design new services to meet new emerging needs.

### Delivering the Overarching Vision

As Barnet's trusted NSCSO service provider, we will deliver a step change in service delivery and customer experience so that interactions with Customers (be they Citizens, Barnet Businesses, Voluntary Organisations, Suppliers, Members or Council Employees) are valued and easy to complete. To do this, we have defined 3 key over-arching design objectives for the NSCSO:

- **Build Service Delivery Differently** – Create a new service delivery paradigm to change the customer relationship. Enable multi-channelled delivery and the ability to bundle services in ways that relate to and are valued by Customers and puts them at the heart of service delivery

- **Manage Service Delivery Differently** – Transform the way Customers interact with our services (and the Council) by transferring control to them. A new level of transparency, rapid process improvements and built-in deeper levels of Insight are inherent in this approach

- **Maximize Efficiencies Differently** – Changing the way Customers interact will impact how services can and should be delivered. Changes will be co-designed with users of the services; focussed on their needs and supported by tools and technology platforms enabling transformation and continual improvement.

Our objective is to offer high quality and relevant services. We will provide effective, engaging and personalised services at every touch point. To achieve this, we will promote a shift from the typically supply dominated "Push" approach to service

design and delivery to a Customer Orientated "Pull" approach, which is time and location independent, personalised and contextual.

We will use the intelligence gathered through co-design and our on-going management of processes and operations to create dynamic and personalised service delivery for all customer groups. This rich understanding of Customers drawn from behavioural analysis, and combined with our experience and Barnet specific Insight, will enable us to identify and understand patterns of Customer behaviour and will be embodied as Single Customer View.

## Service Delivery Model

We will establish a robust Service Delivery Model which enables certainty of delivery and performance, partnership flexibility (commercially and operationally), with investment in infrastructure and capability to support achievement of the Council's outcomes. All Customer groups, internal and external, will interact through the same service delivery model structure, as shown in the diagram below:
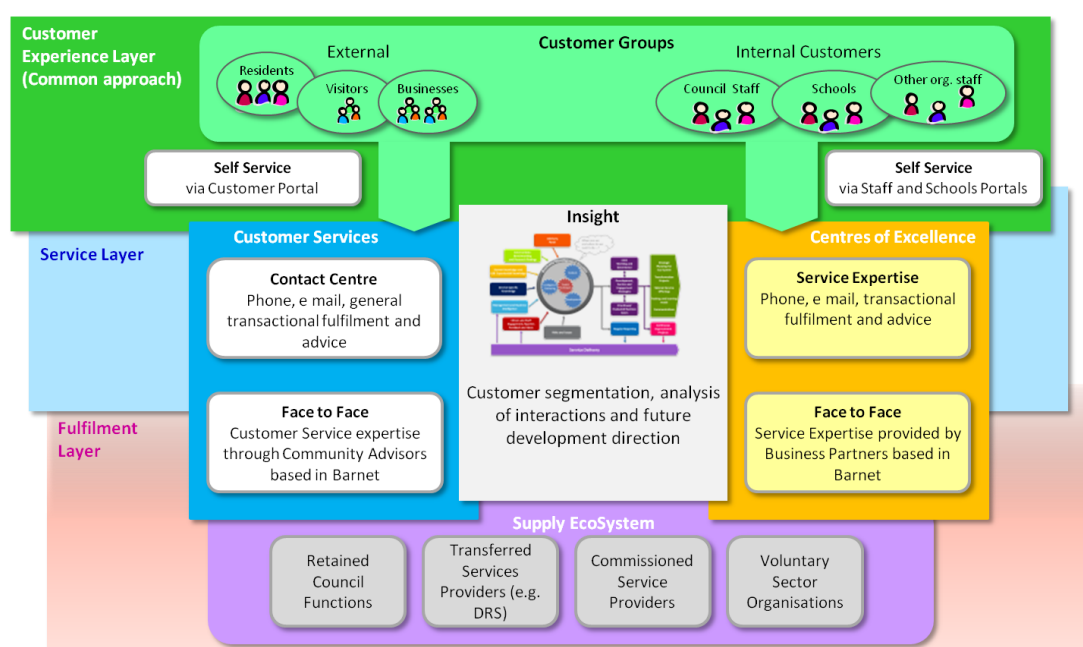


**Figure 1 - NSCSO Service Delivery Model**

We will invest in and deploy **technology and repeatable strategies** that shift the focus from merely surfacing the service offerings, to providing a single window to bundled services from ourselves, the Council and other providers where appropriate.

We will build our service architecture using **flexible rapid service deployment frameworks**. These will enable us to carry out efficient transaction handling, irrespective of channel, and deliver an organisational change capability that enables us to respond effectively to the changing environment. They will also allow us to promote a culture of service excellence and improving delivery while at the same time lowering cost.

At the heart of our proposition is a drive for effectiveness and increased self-help and self-service. This will only be realised if the customer experience is excellent, the

services are relevant and execution is timely. To achieve these, we need to understand what our Customers want to do and design our services, and their constituent transactions, around those needs, ensuring we deliver effectively from beginning to end.

| Event or Trigger Characteristics | Pathway or Life Event Selection | Pathway or Life Event Management | Fulfilment |
|---|---|---|---|
| Identifying at the very start what the customer wants to do.

Authenticating them (where appropriate).

This enables us to take into account their previous interactions, profiles and preferences via a Single Customer View to personalise the experience. | Enabling the customer to easily identify the right service pathway or set of transactions for their context (the right pathway at the right time for the right customer).

This also allow us to trigger "calls to action" to promote and signpost other services (e.g. life event or staff event related bundles). | Ensuring that the pathway delivers value for the customer and satisfies their needs whilst maintaining operational efficiency.

Managing the process on behalf of the customer and keeping them informed of progress. | Ensuring that the promise to the customer is delivered.

Capturing and reporting on operational and strategic insight. |

**Figure 2 - Customer centric, effective end to end service delivery**

This approach will make our services effective and our experience shows us that 'efficiency' follows 'effectiveness' – this is a fundamental element of our business ethos. We will deliver value by:

▪ **Building Delivery Capacity**, not just channels - through an integrated Service Delivery Model that is channel transparent

▪ **Building Delivery Capability**, not just Services - making things easy to do

▪ **Building Operations Competency** - delivering operational excellence, continual improvement, service alignment and business assurance.

## 1.2    CUSTOMER SERVICES VISION

Our overall vision, approach to services design and Service Delivery Model form the basis of the services we will deliver in relation to Customer Services.

Customer Services will play a crucial role part in delivering this vision - our vision for Customer Services at the heart of NSCSO is to:

**Develop a powerful customer centric access model, allowing customers access to a wide range of services using best in class solutions, supported by targeted investment in people and technology.** This is turn supports the Councils vision **to create an excellent customer experience that is satisfying for customers, cheaper for the council and simpler for staff, where services are designed, developed and delivered around the needs of customers.**

**Figure 3 - What customers will want to do**

## Customers

We recognise there are different customer groups we will serve throughout our Customer Service operation. It is crucial that we understand the needs and preference of these customers so that we can meet their expectations, increase self-service adoption and help shape service delivery. We have grouped these customers into the following external and internal groups:

| CUSTOMER GROUP | INCLUDES |
|---|---|
| Externally Focussed | ▪ Citizens/Residents - acting for themselves or on behalf of someone else<br><br>▪ Businesses and suppliers - such as for procurement activities or delivering a service as part of the EcoSystem<br><br>▪ Voluntary organisations and Community Groups delivering services and engagement. |
| Internally Focussed | ▪ Customer Service Staff within the Contact Centre, those staff operating within face to face locations and those staff maintaining and improving the operation, such as knowledge management<br><br>▪ Professional staff within retained Council delivery units (e.g. Adult Social Care and Health)<br><br>▪ Employees within the NSCSO, acting for themselves or as a Manager for their team |

| CUSTOMER GROUP | INCLUDES |
|---|---|
| | ▪ Elected Members - regarding their portfolio services as well as for Members of their Wards <br><br> ▪ Professional staff within the internal NSCSO functions - such as HR, IT, Finance, Procurement. |

Internal and external customers will benefit from the implementation of improved tools, enabling them to self-serve and self-help. Customer Services will be the advocate for customers with all service delivery partners, representing the customer's needs to ensure that the required levels of service are delivered in line with expectations and initiating escalation activities when this does not happen.

Once transformed, the service will consistently and unequivocally meet, and in many cases exceed, the Council's performance requirements.

## 1.3 SERVICE DELIVERY MODEL

In this section, we describe our **Service Delivery Model (SDM)** for Customer Services, which is at the heart of our overall solution and describes our approach to achieving the vision.

Our Customer Services solution will deliver the customer experience layer described in our overall SDM. The solution will manage all customer contacts for external customers.

We will be operating in line with this model within one year of service commencement and will continually improve the services during the contract by: refining the mix of interactions at each touch point, reviewing the locations of the services and continuously improving the services.

Our solution is predicated on the need for a single view of the customer which we will implement through our technology transformation activity, further detailed in the Transformation Method Statement.

The **Service Delivery Model (SDM)** encompasses a customer-centric approach for transforming services to achieve the required specification. Our customer-centred approach to service design, which has customers participating in the redesign of services in order to increase the likelihood of them being used in the way we need, is laid out in detail in the Transformation method statement.

| **Customer Experience Layer** | Customer experience is a key driver to achieving cost-effective customer behaviours, such as channel shift. Therefore we will invest in a set of consistent, personalised and usable channels, all underpinned by the single customer view. We will design intuitive, convenient and secure self-service options (internet, natural language and IVR), that are redesigned according to customer tasks and customer life stages. In doing so we will increase single-contact resolution and reduce failure demand. <br><br> We will guarantee quality of service by providing clear guidance to |

all who speak and write for the Council, and will deploy quality assurance and governance techniques to ensure those guidelines are adhered to. We will continually work to evolve the service offering, and access channels based upon customer and market insight.

**Service Layer**

This ensures effective and efficient handling of contacts from all channels through to completion.

The **Front Office** will manage contacts received through all non-automated channels. We will staff the Front Office with Customer Service Professionals, empowered by our Insight Engine and agent desktop to provide a smart, tailored response to individual customers. This will contribute to a significant increase in the number of calls resolved at first contact and reduction in the number of repeat calls. In addition, we will introduce natural language and IVR call routing, as well as investing in training, multi-skilling, script production and a supporting knowledgebase.

**Face-to-face services** will be provided by Frontline Service Delivery Professionals, with a real focus on **community engagement**. We will engage our partners and place Community Advisors at Community locations, realising the potential of agile, mobile working, in their customer's homes, businesses and community locations.

**Fulfilment Layer**

All processing-based activities for Barnet will be delivered by Specialist Service Support Teams. They will be based in Capita's Centres of Excellence and will be seamlessly integrated through technology.

We will leverage our broader capability and drive efficiency by:

- Developing and multi-skilling staff

- Undertaking a Lean review for processes (e.g. debt collection)

- Continually reviewing, improving and automating processes (e.g. payment reminders).

Through **Commissioned Services,** we will increase the number of providers of Council services and link them to customers receiving these services (e.g. community groups, schools, small-to-medium businesses).

The **Insight Engine** will gather qualitative and quantitative insight from a wide variety of internal and external sources, then analyse and deploy it:

- At the point of need, to provide customers with intelligent

servicing that anticipates their needs

- As a routine input to continuous improvement activity, to focus efforts at improving and redesigning customer tasks and life stages

- As a strategic tool for marrying supply with demand, in an evolving, responsive and innovative Service Delivery Model.

**The SDM will meet the current and future needs of the Council and will deliver value to other public sector agencies through its service flexibility, utility approach and customer engagement.**

The Customer Service specification fits into this as detailed below.

| OUTPUT SPECIFICATION REFERENCE | DELIVERED THROUGH | | | | |
|---|---|---|---|---|---|
| | **Self Help/ Self Service** | **Contact Centre** | **SME** | **F2F** | **Processing** |
| CS001 | | X | X | X | X |
| CS002 | | X | | | |
| CS003 | | | | X | |
| CS004 | X | X | | | |
| CS005 | X | X | | | X |
| CS006 | | | | | X |
| CS007 | | | | | X |
| CS008 | X | | | | |
| CS009 | | X | X | X | |
| CS010 | X | X | X | | |
| CS011 | X | | | | |
| CS012 | X | X | X | X | X |

| Output Specification | Delivered through | | | | |
|---|---|---|---|---|---|
| CS013 | X | X | X | X | X |
| CS014 | X | X | X | X | X |
| CS015 | X | X | X | X | X |
| CS016 | X | X | X | X | X |
| CS017 | X | | | | |
| CS018 | X | X | X | X | |
| CS019 | X | X | X | X | X |
| CS020 | X | X | X | X | X |

**Figure 4 - Customer Service Output Specification against the Service Delivery Model**

## 1.4 HIGH LEVEL MODELLING ASSUMPTIONS

As discussed in detail in workstream and Core dialogue, we have conducted a thorough analysis of the Council's customer contact data, including call volumes, types and average handling times to ensure we are designing and costing the optimum solution for the Council and the partnership in terms of performance and efficiency.

The final query remaining relates to the variance in the baseline contact volumes and the transferring budget and whether these volumes can be accommodated within the transferring staff and budget baseline, and be delivered to the KPIs stated in Schedule 4, Part 1.

In preparing our model we have taken on board the Council's assumption, in relation to the remaining query, that the Customer Service Transformation Programme currently being undertaken will be complete by October 2012 and will realise the anticipated service efficiencies.

Our detailed approach to this is described within Section 6.1, Implementation of this Method Statement.

**Customer Service Solution - Key Components**.

Our solution for Customer Services builds upon our experience of running over 60 operations with over 200 million contacts per annum, using best practice from public and private sectors, as well as innovation of new areas. We understand from dialogue that this balance is important to the Council.

Our solution is a **consolidated Customer Services operation,** which is **multi channel for all external services**. This will include the external Council services and channels as described within section 4.3 of the Customer Service Output Specification (Final Draft v5).

We will provide customers with simple access to a variety of channels, enabling customers to self-serve and self-help, thereby reducing unnecessary contacts, leading to reduction in cost, an increase in customer satisfaction and an improved customer experience, providing advocacy for the customer across Partners.

Geographically our service delivery model will operate as follows:

- The Contact Centre will be delivered through one of our existing sites - our Darwen TV Licensing operation. This is an established and scalable operation, which has successfully adopted a customer focussed and insight driven strategy, similar to the approach which was seen during the Council site visit to our operations in Dearne Valley and will also be the location for our Service and Channel Development Team (described in section 1.7.2). This will be complemented by our experience of running local government operations across the UK and nearby. This is with the exception of Adult Social Care services which will remain delivered out of Barnet in the first instance and we will evaluate the benefits of moving this service to Darwen, through discussions with the service area

- Face to Face will continue to be an important part of our solution, moving the Council closer to its residents, building a new relationship with them through an approach which has community engagement at the heart and refocusing service provision to deliver those aspects which require face to face intervention. Services will initially remain being delivered through the existing locations of Burnt Oak Library, Barnet House and NLBP and we will work with the Council, our Partners and our Estates Service.

Our solution will:

- Be aligned to the Council's strategic objectives and values and be flexible to adjust as these change over time

- Allow for the management and sharing of data and Insight to enable a citizen-centric Council

- Contribute to high and measured customer satisfaction

- Enable Citizens and Customers to do things for themselves

- Maximise access channels and improve quality of experience

- Meet the diverse needs of customers

- Provide a compliant and high quality service delivery.

The above are in line with the Council's objectives as stated within the Customer Service Output Specification, specifically:

- Improve customer satisfaction by being more effective in meeting needs

- Service delivered via the most cost effective channel

- A service that helps manage demand at the front end

- Enable customer independence

- 'Intelligent' design – driven by customer insight

- Drive down end-to-end cost of delivery

- Free up professional time.

Our solution for Customer Services is at the heart of our overall solution and will realise efficiencies as we build upon the foundation of the work started by LBB through the Customer Service Transformation. Through the implementation of our enabling technical platform and deployment of our best practice processes, we will deepen service delivery at the first point of contact, reduce hand-offs and increase adoption of self-service and self-help. We will also provide advocacy for customers across services which are within the NSCSO scope, representing them with service delivery units when there are issues/queries with service delivery.

Our solution will create a platform that will enable continued transformation, through deepening and broadening of services delivered through Customer Services, enabling increased savings and increased customer satisfaction. This is described in the Phase 2 - Customer Services later in Section 2.

**Supporting and Enabling our Customer Access Strategy**

There are a number of crucial elements within our solution which will support and enable the implementation of the Customer Access Strategy. These are described in more detail in section 1.6 and include:

- The **Insight Engine** which will gather information to aid in the development of all our strategies and to shape interactions and future service delivery

- A **Service and Channel Development Team** that will provide on-going support to shape and design the multiple channels and services as customer needs evolve

- The **EcoSystem** and **Signposting -** enriching the customer experience and using the 'front-door' of Customer Service to manage demand for the back-office and enabling customers to self-help

- **Co-design** with staff and customers.

Our **technology solution** will enable the **Single View of the Customer** and **Personalisation,** providing the platforms that will allow us to interact with different services and partners in the fulfilment and management of customer requests. This is described in more detail in section 4.

## 1.5 CUSTOMER ACCESS STRATEGY

Customer Services is at the heart of our solution and service delivery model, providing the experience that will enable a new relationship with citizens. It is therefore essential that our Customer Access Strategy is designed to ensure the contact experience drives and underpins this.
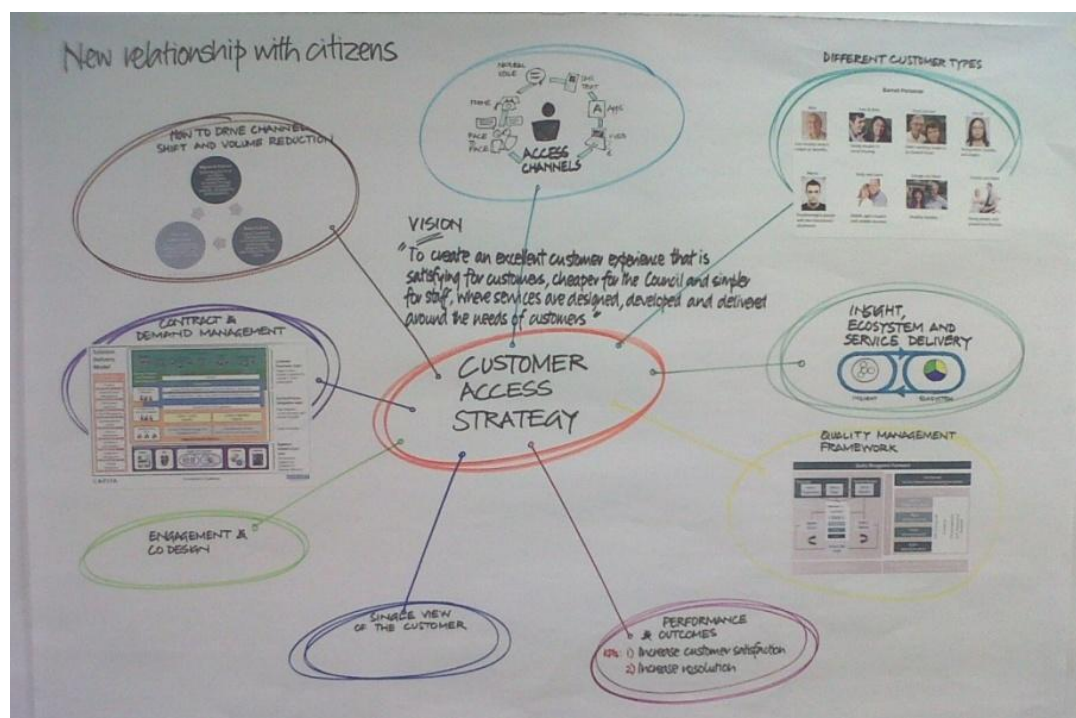


**Figure 5 - Customer Access strategy at the heart of our solution.**

We will deliver the services which have been consolidated into Customer Services through the LBB Customer Services Transformation. We will enable deeper resolution of customer enquiries, improve end-to-end customer experience and realise efficiencies through the use of our technology platform, best practice processes and deployment of our Customer Service Strategy, which includes key elements such as the single view of the customer, as described in Section 1.6.1.

Our approach to Customer Services encompasses the whole of the Council and its delivery partners. We will work with the Council to ensure the Customer Services Organisation (CSO) contributes to the Council's objectives, in particular *building a new relationship with the Customer*, ensuring end services can leverage the NSCSO investment.

The Customer Access Strategy includes:

- Single view of customer and personalisation

- Tiered model for customer interactions

- Segmentation of customer groups and blending channels

- Life events and customer tasks

- Multi-channel access

- Channel shift

- Self-help

- Interaction consistency.

### 1.5.1 SINGLE VIEW OF CUSTOMER AND PERSONALISATION

As described within our Section 2 approach to delivering CS012, Access to Data, we will provide a **single view of the customer**, based on service interactions and the Council's chosen corporate address database (currently NLPG/LLPG).

This single view will be available to customers as they access their 'on-line account', as well as to customer service staff through CRM.



**Figure 6 - Single View of the Customer available on-line**

Using our Insight, customer service staff will be able to have an informed and personalised interaction with the customer, understanding both their personal service use and that of similar customers. Through a deeper understanding of each customer, their service needs and contact preferences, we will be able to promote certain services to those residents who are most likely to require them; provide a service that will increase first contact resolution; and increase channel shift.

**On-Line Account: Planned Integrations**

Our on-line account product, Capita Connect, provides for customer registration and authentication within the Council's web site. It is a productised solution contracted for by over 100 local authorities.

We will complete a phased implementation by April 2014 and will prioritise, as part of our co-design approach with users and the Council, which transactions and functionality to implement at what stage. Our proposal includes the following service

areas and transactions, although this will be subject to formal specification and scoping exercises with the Council to ensure we provide for high demand services.

- Council tax

  - Pay council tax online

  - Change council tax address online

  - Check balance of account online

  - System: Civica

- Parking and Permits

  - Pay permits online

  - Contest parking fees online

  - System: Civica

- Housing Benefits

  - Claim housing benefit and council tax benefit online without using PDF forms

  - Check on housing benefit claims online

  - Re-pay housing benefit overpayments

  - System: Civica

- Assisted Travel

  - travel vouchers and Freedom pass

  - System: Northgate

- Electoral Registration

  - Enable people to register to vote online

  - System: iDox Strand"

- Envt & Operations

  - Refuse collection

  - Environmental Health

  - Systems:

  - CRM to raise requests/ job tickets

- Acolaid to process Safer Communities and PIT enquiries and service requests

- Registrars

  - Book appointment with registrar for birth / marriage / death online

  - Order replacement certificates

  - System: Stopford

- Libraries

- Schools

  - Admissions - the Customer on-line account with respect to school information is restricted to Admissions only

We will re-use existing code where possible and develop additions using our standard platform and tools.

Capita's Connect is continually enhanced based on user demand and benefit realisation for its client base. As a key client of Capita the Council will be in the unique position of being able to drive our future development roadmap. A good example of a recent enhancement is the ability for citizens to register their loyalty card (Nectar, Tesco etc) as an incentive to start using on line services.

In addition to the above we have identified 4 service areas to be targeted for integrations with Lagan CRM. The integrations are summarised below:

- Decorated URL's for:

  - Libraries

  - Education

- Two way integration for:

  - Parking & Permits

  - Environmental services

We have chosen these areas because we believe they are likely to be high volume and high value for Customer Services and the citizen. As discussed during dialogue we have made this provision but will re-evaluate suitability with the Council and service areas at the next stage. The Single Customer Account can be expanded to other services areas (outside of our initial provision) and we would expect this to be examined via the agreed business case process.

## 1.5.2 TIERED MODEL FOR CUSTOMER INTERACTIONS

We have adopted the Council's tiered model approach to service delivery for all channels and services in scope of the CSO. The Council has already grouped the

services in scope into the tiers, as a result of their Customer Service Transformation programme.

We have experience of delivering to this style of model within a number of our Customer Services operations, for example within our Strategic Partnership with Birmingham City Council.

The customer interaction tiers are as follows, with CSO typically delivering tiers 0-2:

- **Level 0** - Enabling self service/ automated processes

- **Level 1** - Delivering simple information enquiries/ processes that do not require deep service specific knowledge/ access to systems

- **Level 2** - Delivering service specific enquiries/ transactions that require more complex information capture and access to relevant systems and can be dealt with by a specialist Customer Services team

  Within the Contact Centre, we will group together tier 1 and 2 interactions for all services. These will be managed within the 3 themes of services (People, Street and Property), which will be represented by operational teams. Adult Social Care will remain as a team in Barnet

- **Level 3** - Service areas delivering specialist enquiries/ processes.  The exception to this is Revenues and Benefits, which, as described in the Output Specification, will be delivered through the CSO as the Customer Service Transformation assessment resulted in a small amount of activity remaining with the service and it will prove beneficial to have the end-to-end process within Customer Services.

## 1.5.3  SEGMENTING CUSTOMER GROUPS AND BLENDING CHANNELS

Barnet has a diverse range of customers, each having different needs and varying levels of demand on Council services. In order to understand these needs and contextualise them in terms of customer contact, we have developed a number of customer personas for representative groups (segments) of residents of Barnet.

The customer personas represent an evidence-based customer segment, having been matched with recognised 'standard' Cameo profiling segments. Personas are design tools used to remove guesswork from the decision-making process, enabling us to ascertain how the different groups may need or want to interact with the Council, its partners and its various services.

Barnet is a large and populous borough, so by designing for everyone we risk designing for no-one. Our project teams will therefore adopt personas throughout our transformation programme, as a low-cost tool to represent customer needs, and to therefore steer decision making as to, for example, 'how Anne would use it'.

| Group | Cameo Title | Barnet Persona | Barnet Persona Title |
|---|---|---|---|
| 1C | Urban Living Professional Single and Couples | Victoria & Peter | Young people with prosperous lifestyles |
| 2D | Wealthy Suburban Professionals in Mixed Tenure | George and Mary | Wealthy families |
| 3A | Wealthy Older Families in Spacious Suburban and Rural Detached & Semis | | |
| 4B | Professional Home Owners in Detached and Semis | Andy & Laura | Middle aged families with middle incomes |
| 5B | Young and Older Single Mortgagees & Renters in Terraces and Flats | Alfie | Low income Seniors reliant on Benefit |
| 6B | Older and Mature Households in Suburban Semis and Terraces | Fred and Ann | Older working couple in ex-Council House |
| 7B | Singles & Families in Ethnically Mixed Inner City and Suburban Areas | Lim So | Young ethnic families and singles |
| 8C | Older households with School Age Children and Towns and Suburbs | | |
| 9G | Young & Older Households in Housing Association and Mortgaged Homes | Sam & Gina | Young couples in social housing |
| 10D | Singles and Single Parents in Suburban Hi-Rise Flats | Marco | Disadvantaged people with low educational attainment |



| 1C | Urban Living Professional Single and Couples | Victoria & Peter | Young people with prosperous lifestyles |
|---|---|---|---|

Victoria and Peter want to move in together. Peter has been in a wheelchair for 3 years following an accident but is able to work from home using the web. Victoria is a geriatric nurse at Barnet Hospital Their joint salaries give them a reasonable household income. They normally have no real contact with Council, but have bought a new flat and plan to move house soon.

| 2D | Wealthy Suburban Professionals in Mixed Tenure | George and Mary | Wealthy families |
|---|---|---|---|

George and Mary live in Garden Suburb. George is a self-made man who has started and still controls several successful businesses. Mary has been a stay-at-home for their family, and is now part time carer for George's father. She is feeling the strain of being a carer and feels she needs to talk to someone not directly involved. Mary's also an active volunteer for several charities George has designed a sorter that helps people determine which waste to put in which bin. He'd like to develop this so people could put all their waste into the sorter and it would automatically compress the waste and put it into a single, smaller, composite wheelie bin. He wants the Council to support the idea.

| 4B | Professional Home Owners in Detached and Semis | Andy & Laura | Middle aged families with middle incomes |
|---|---|---|---|

Andy is MD of his own building business, Builders4U and has lived in Barnet all his life. Laura works a few hours a week in local shop, fitted in round the children, but is beginning to have more time on her hands. Andy employs 10 people directly and sub-contracts trades to local small businesses. He has developed expertise in pre-fabricated sustainable office solutions and has seen growth, but the recession is starting to bite. He can't find youngsters willing to be apprentices either. Potholes outside his yard are causing damage to his vans.

| 5B | Young and Older Single Mortgagees & Renters in Terraces and Flats | Alfie | Low income Seniors reliant on Benefit |
|---|---|---|---|

Alfie lives on his own in small bungalow, which is now draughty and cold in winter. He loves living in Golders Green and feels very much part of the community. He used to use his car to visit children and grandchildren, who live in Kent, but can't drive now since slipping on ice. He's interested in military history and used to be able to get books from library. Alfie is careful with money, but concerned about rising prices.

| 6B | Older and Mature Households in Suburban Semis and Terraces | Fred and Ann | Older working couple in ex-Council House |
|---|---|---|---|

Fred and Ann live in a former Council House, bought under Right to Buy. Fred is a self employed plumber. Ann helps with the accounts, but has time on her hands. Both are keen on recycling and Ann enjoys gardening. Both are concerned about impact of the recession on Fred's business and their ability to keep up regular payments.

| 7B | Singles & Families in Ethnically Mixed Inner City and Suburban Areas | Lim So | Young ethnic families and singles |
|---|---|---|---|

Lim So is a single mother with one daughter, Lee Mi, and lives in Edgware. Her father has just passed away. Her mother struggles with English and is in poor health. Lim So is stressed with having to deal with the break up of her relationship and is finding it difficult to deal with her father's death. She is also worried about how Lee Mi is coping at school and very concerned how her mother will cope living alone.

| 9G | Young & Older Households in Housing Association and Mortgaged Homes | Sam & Gina | Young couples in social housing |
|---|---|---|---|

Sam and Gina have just moved in to their first house together, an ex Council House managed by Barnet Homes. Sam has been unemployed for 6 months and is finding it hard to get work. Gina is pregnant, currently unemployed and concerned about being able to look after the baby. Both worry about how they will be able to afford to live when the baby arrives.

| 10D | Singles and Single Parents in Suburban Hi-Rise Flats | Marco | Disadvantaged people with low educational attainment |
|---|---|---|---|

Marco was born in Poland and moved to Barnet with his parents, with whom he still lives. He was bullied at school and left as early as possible. He now works in a local Pizza outlet. He's a budding actor and wants to use the Internet to look for opportunities, but can't afford a PC. He worries about anti social behaviour and groups of youths on the street where he lives.

**Figure 7 - Barnet personas matched to Cameo groupings**

## How we will populate Personas

During Transition and Transformation our Insight Team will draw on quantitative (data analytics and large scale surveys), qualitative data (in-depth interviews and focus groups) to develop a customer segmentation. Each segment will then be distilled into a persona with external date from Callcredit and Council service delivery data to match service usage data to personas. We will segment based on the following variables:

▪ Demographics including, age, gender, employment and financial status, family status and education

▪ Geography, such as place of residence and place of work

▪ Psychographics - patterns of shared and relevant attitudes / characteristics, such as attitudes to self-help, self-service, technology and the Council

▪ Service and media consumption, which services they engage with, the channels they engage through and the media that informs their opinion of the world

This focus on customer segments allows us to profile and better understand the shape of the Barnet population, both in terms of who they are and what motivates them to behave in certain ways. The Insight Team will then delve into each segment in turn, to draw out the key defining characteristics of that segment. These will then be articulated as an archetypal persona for that segment, with a face and a name, and often extended to make them more rounded and human with traits, likes/dislikes and frustrations.

The draft personas will be socialised at different levels within the NSCSO and Delivery Units, as appropriate as part of our co-design approach, to ensure that they are credible. They will be refined during this process, until such point as they are signed off with the Council for operational usage. The Insight Team will then maintain them alongside the segmentation model.

The Insight Team will over time on a project-by-project basis, work with different service areas to define relevant and credible scenarios for each persona. For example, Persona 1 has a health condition that needs resolution, or Persona 2 is making a benefit application. These scenarios are an extension of the personas, and provide a task-specific context for more detailed customer journey mapping and co-design work.

## Multichannel/service blend

Using this high level segmentation approach, we have assessed the likely level of service interaction by customer group versus the services available from the Council and associated channel volumes to ascertain the Customer Group/Service/Channel Matrix for Barnet.

| SERVICE USAGE PROPENSITY | Customer Group % | 1: Affluent Singles & Couples In Exclusive Urban Neighbourhoods | 2: Wealthy Neighbourhoods Nearing & Enjoying Retirement | 3: Affluent Home Owning Couples & Families In Large Houses | 4: Suburban Homeowners In Smaller Private Family Homes | 5: Comfortable Mixed Tenure Neighbourhoods | 6: Less Affluent Family Neighbourhoods | 7: Less Affluent Singles & Students In Urban Areas | 8: Poorer White & Blue Collar Workers | 9: Poorer Family & Single Parent Households |
|---|---|---|---|---|---|---|---|---|---|---|
| | % | 25% | 31% | 1% | 16% | 3% | 6% | 4% | 7% | 2% |
| Service Group | Call % | | | | | | | | | |
| School Admissions | 7% | L | M | L | M | L | L | M | M | H |
| Adult Social Care | 11% | L | H | L-M | L | L | M | L | L | L |
| Assisted Travel | 3% | L | M | L | L | L | M | L | L | L |
| Housing (inc Benefits) | 22% | L | L | L | L | L | L | M | M | H |
| Council Tax | 10% | L | L | L | L | L | H | H | M | H |
| Environmental/Waste | 11% | L | H | M | M | M | H | M | M | L |
| Education Welfare | 0% | L | M | L | L | L | L | M | M | M |
| Electoral Services | 1% | M | L | L | L | L | L | L | L-M | L |
| Children's and Youth | 4% | L | L | L | M | L | M | M | M | M |
| Democratic Services | 2% | M | M | M | L | L | L | L | L | L |
| Libraries | 15% | L | L | M | L | L | L | M | M | H |
| Parking Permits | 9% | M | L | L | L | M | L | M | L | L |
| Registrars | 4% | M | L | L | L | L | L | L | L | L |
| | | H | H | M | H | H | L | H | M | M |
| SERVICE ACCESS PROPENSITY | Customer Group % | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| | % | 25% | 31% | 1% | 16% | 3% | 6% | 4% | 7% | 2% |
| Self Service | | H | H | M | H | H | L | H | M | M |
| Phone | | M | M | H | H | H | H | M | H | H |
| Face to Face | | L | L | L | L | L | M | L | M | H |

**Figure 8 - Customer Group, Service, Channel Matrix for Barnet**

This has enabled us to shape our customer services operation, based upon which services different customers are likely to require, their volumes of service interaction, the customers location and their preferred channels.

We have applied percentages to each of the high, medium and low ratings to gain a scale of propensity to contact by service for each group, enabling us to size the service by customer group and by channel. We are then able to highlight those services and customer groups for whom channel shift is likely.

Our analysis confirmed that there is a wide range of customer needs across Barnet, ranging from large numbers of customers in affluent customer groups to smaller numbers of customers in more deprived customer groups. Each group represented has very different service needs and channel access expectations.

Customers in the more affluent groups will tend to contact more concerning generic or impersonal services, while the opposite applies for customers in the less affluent groups. The latter are more likely to have a higher requirement for services such as Housing Benefits and Social Care, often requiring face to face engagement, whereas the more affluent groups are more like to have a need for environmental, planning and parking services, which they would be happy to access through self-service.

These are, of course, generalisations. However, by understanding the size of these groups in Barnet, we can ensure that we focus on the right areas for channel shift to self-service and establish what face to face provision is essential.

As an example of our approach, the table below uses our Insight in detailing how we expect current levels of calls to reduce as we implement solutions to channel shift activities across the customer groups.



### Resident Population, Contact Centre Calls and our Channel Shift

| | Population | Original Call Volumes | Post Channel Shift Call Volumes |
|---|---|---|---|
| 1: Affluent Singles & Couples In Exclusive Urban Neighbourhoods | 26% | 17.4% | 11.6% |
| 2: Wealthy Neighbourhoods Nearing & Enjoying Retirement | 32% | 33.1% | 23.5% |
| 3: Affluent Home Owning Couples & Families In Large Houses | 1% | 0.8% | 0.5% |
| 4: Suburban Homeowners In Smaller Private Family Homes | 16% | 10.9% | 7.0% |
| 5: Comfortable Mixed Tenure Neighbourhoods | 3% | 2.0% | 1.3% |
| 6: Less Affluent Family Neighbourhoods | 6% | 7.2% | 5.9% |
| 7: Less Affluent Singles & Students In Urban Areas | 4% | 5.5% | 4.0% |
| 8: Poorer White & Blue Collar Workers | 7% | 8.4% | 7.1% |
| 9: Poorer Family & Single Parent Households | 2% | 6.1% | 5.5% |
| 10: Poorer Council Tenants Including Many Single Parents | 3% | 8.5% | 7.9% |

**Figure 9 - Channel shift from phone, by customer group.**

## Customer Group Geographic Spread

The selection of maps below demonstrates the customer groups spread across Barnet, highlighting the large scale and prevalence of some groups. Tools such as these feed into our Insight Engine, helping to shape service delivery and provide focus for channel shift, through links to our customer/channel/service analysis.
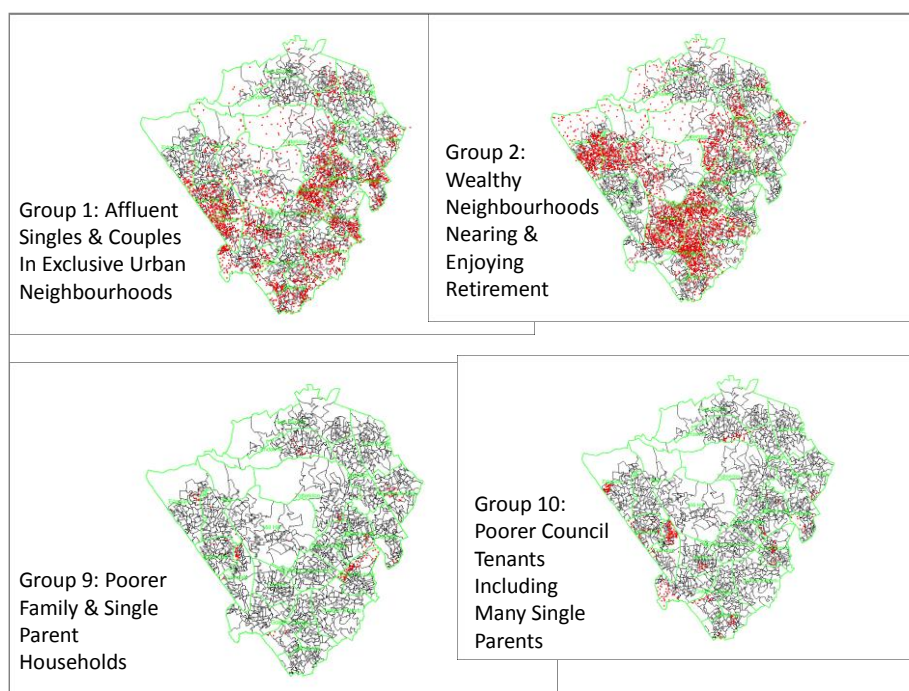
**Figure 10 - Selection of maps detailing customer groups**

Analysis such as that shown above is used to shape our Face to Face service provision. The figure below highlights there are high proportions of the less affluent groups in areas such as Colindale.

| Ward_Name | 1: Affluent Singles & Couples In Exclusive Urban Neighbourhoods 25% | 2: Wealthy Neighbourhoods Nearing & Enjoying Retirement 31% | 3: Affluent Home Owning Couples & Families In Large Houses 1% | 4: Suburban Homeowners In Smaller Private Family Homes 16% | 5: Comfortable Mixed Tenure Neighbourhoods 3% | 6: Less Affluent Family Neighbourhoods 6% | 7: Less Affluent Singles & Students In Urban Areas 4% | 8: Poorer White & Blue Collar Workers 7% | 9: Poorer Family & Single Parent Households 2% |
|---|---|---|---|---|---|---|---|---|---|
| Brunswick Park | 2% | 2% | 0% | 16% | 0% | 6% | 3% | 3% | 12% |
| Burnt Oak | 8% | 0% | 0% | 1% | 3% | 9% | 1% | 25% | 2% |
| Childs Hill | 7% | 5% | 0% | 2% | 13% | 3% | 0% | 5% | 1% |
| Colindale | 8% | 0% | 0% | 1% | 4% | 1% | 26% | 5% | 13% |
| Coppetts | 7% | 1% | 0% | 10% | 4% | 3% | 5% | 7% | 5% |
| East Barnet | 1% | 1% | 10% | 12% | 7% | 13% | 11% | 5% | 1% |
| East Finchley | 6% | 1% | 0% | 6% | 4% | 0% | 0% | 7% | 29% |
| Edgware | 2% | 11% | 0% | 0% | 0% | 4% | 3% | 2% | 6% |
| Finchley Church End | 3% | 10% | 0% | 1% | 2% | 0% | 0% | 2% | 0% |
| Garden Suburb | 8% | 8% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Golders Green | 4% | 10% | 0% | 0% | 0% | 4% | 0% | 2% | 3% |
| Hale | 2% | 8% | 0% | 3% | 3% | 6% | 0% | 11% | 1% |
| Hendon | 5% | 11% | 0% | 1% | 0% | 2% | 0% | 1% | 0% |
| High Barnet | 2% | 2% | 20% | 13% | 11% | 3% | 5% | 2% | 2% |
| Mill Hill | 5% | 7% | 12% | 4% | 9% | 6% | 0% | 4% | 1% |
| Oakleigh | 2% | 5% | 19% | 9% | 2% | 7% | 2% | 6% | 1% |
| Totteridge | 6% | 7% | 29% | 0% | 5% | 2% | 0% | 1% | 6% |
| Underhill | 1% | 1% | 9% | 9% | 3% | 19% | 0% | 8% | 8% |
| West Finchley | 11% | 2% | 0% | 2% | 7% | 1% | 17% | 0% | 0% |
| West Hendon | 6% | 6% | 0% | 0% | 4% | 4% | 18% | 3% | 1% |
| Woodhouse | 5% | 1% | 0% | 9% | 17% | 5% | 8% | 2% | 10% |

**Figure 11 - Barnet customer group by Ward.**

Similarly, we have used data, such as that shown below - detailing current internet usage by postal sector and household density, linking to our analysis of customer group, service and channel needs, to help shape our solution.
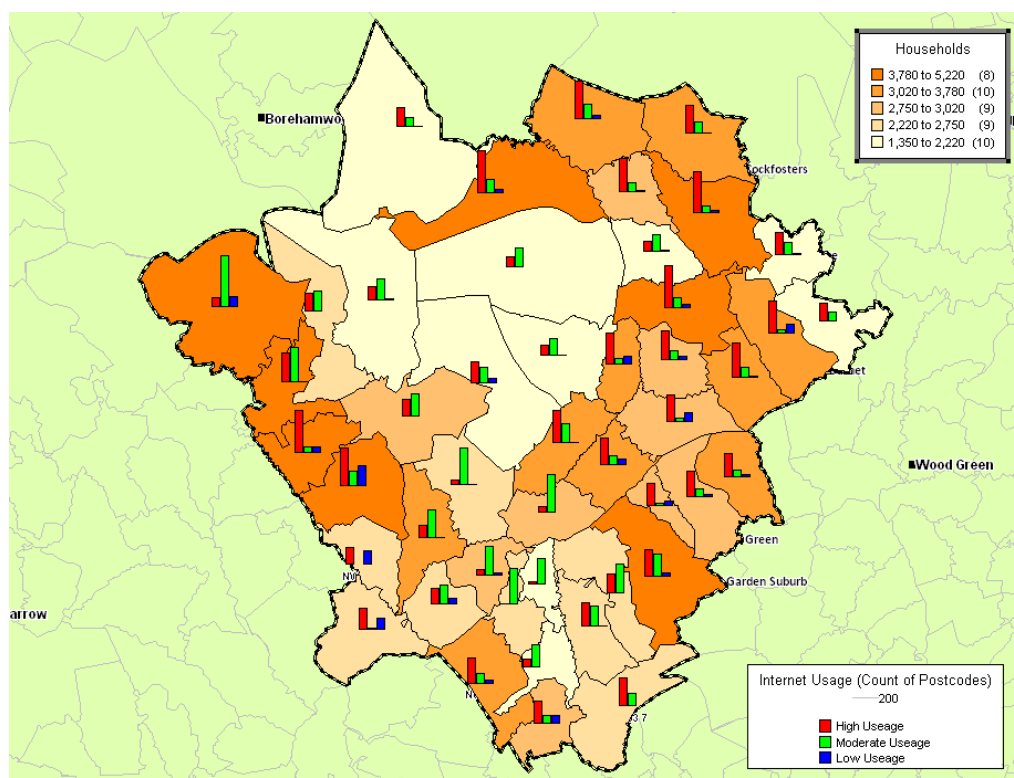
**Figure 12 - Internet usage by post sector and household density.**

We will continue to develop our analysis of customers, refining the groups, the services they require and the access channels through which they receive the services from award of contract for the entire duration of the Agreement. Blending and matching data from actual contacts will also feed into the Insight Engine, further developing and enriching our understanding, building confidence in the access strategy and ensuring that we recognise and continue to respond to changing patterns of need across the customer groups and Borough.

Analysis will be used across all services, such as by identifying customer groups that are affected by more than one of the anticipated changes to council tax/social fund/social sector rent restrictions and, using this Insight to assist this group, minimise the anticipated drop in Council Tax collection through targeting communications with customers.

## 1.5.4 LIFE EVENTS AND CUSTOMER TASKS

In addition to our analysis of customer group, location, service, channel, etc, we are also focusing on what the customer is trying to achieve from the service. We are taking two perspectives on this - life events and customer tasks.

### Life Events

Recognising how customers deal with life events is a key part of our solution. The repercussions of not supporting customers through major life transitions can be numerous and costly. Life events can change the 'norm' for a customer for a period of time and even move people between customer groups due to changes in circumstances.

For instance, failing to support someone through the transition to becoming a carer for a loved one can lead to poorer health outcomes, increased isolation and stress, as well as acute costs further downstream. We will therefore invest considerable effort in redesigning the way we support customers through these life stage transitions, providing  practical information and signposting and helping to reinforce their emotional resilience.

We recognise that in order to provide excellent customer service, it is not sufficient to simply respond with one service. Our solution will link life events to related services and customer interactions. For example, when a customer calls to advise us they have become homeless, our trained customer service professionals will know to question the reason why someone has become homeless, looking not just at the presenting need, but at the underlying need. From here we can be proactive to ensure the customer gets the support and advice they need, preventing the need for future avoidable contact.

The example in the diagram below shows how a number of life event triggers can result in a contact for someone declaring themselves as homeless, and how we could assemble a 'bundle' of additional services available during the call, which can then be offered or signposted by the advisor as appropriate, based on customer responses.
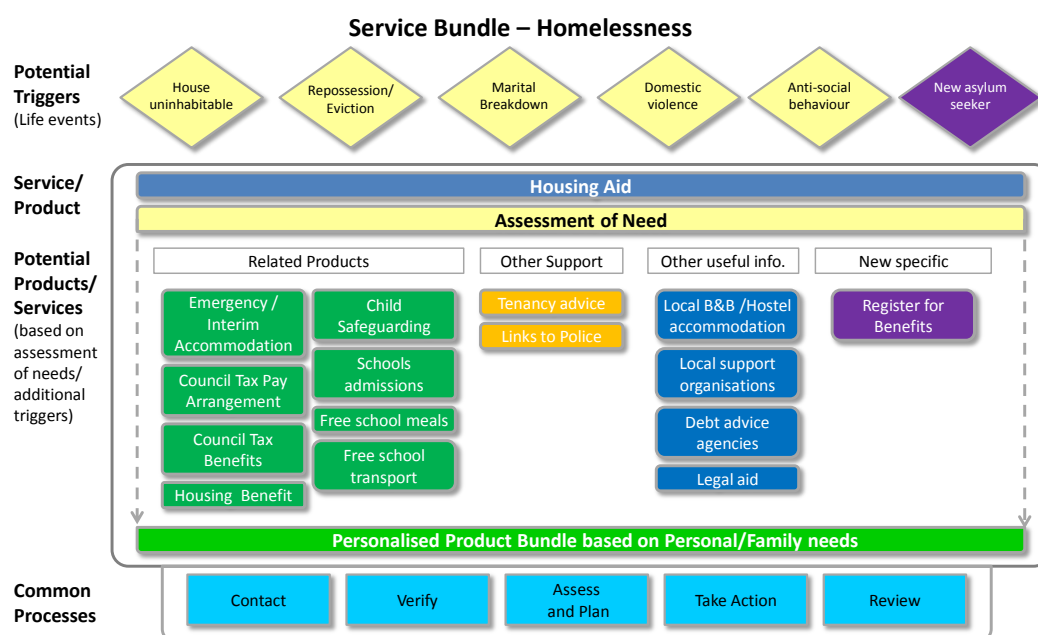


**Figure 13 - Service Bundle example**

In order to facilitate this approach, we will utilise key elements of our technical solution (described in Section 4), such as CRM and the Rules Engine, to assist the advisor. An example of this is shown below, where the customer has called the contact centre, being unable to pay his Council Tax bill. The advisor, through scripting, has identified that the root cause of this is redundancy. The Rules Engine identifies the service bundle associated with redundancy, selects those most appropriate to the caller's customer grouping, and offers these to the advisor. As part of our understanding of the wider EcoSystem, as described in section 1.7.3, these

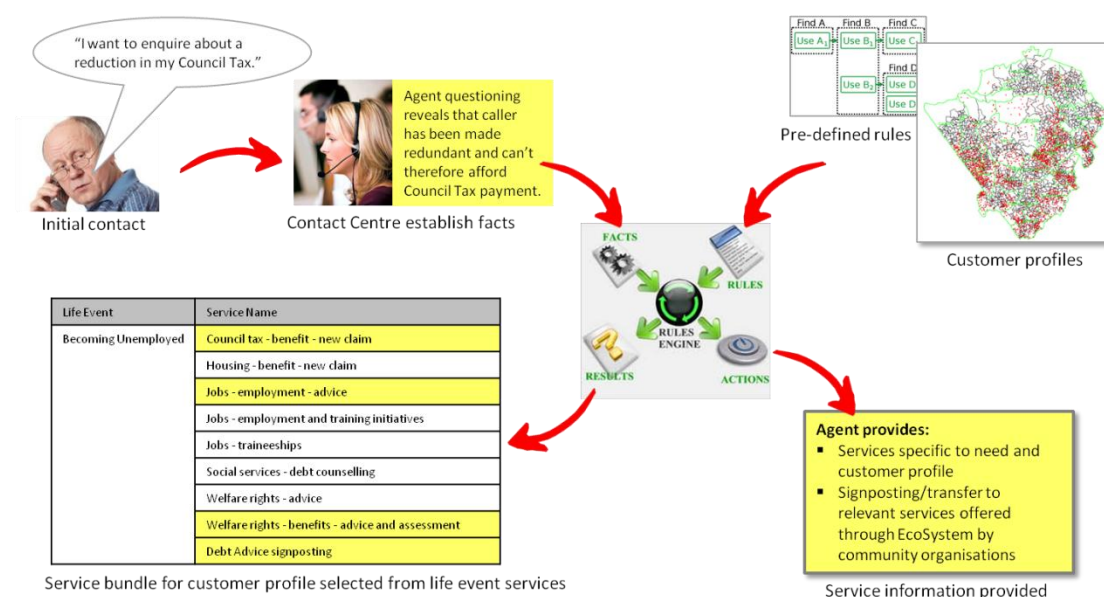may include services provided directly by the Council, one of its Partners, or a community organisation.



**Figure 14 - Life Event example**

The table overleaf is based on activity we have undertaken with Sheffield City Council, where we have grouped Life Event activities into themes and linked them to services. We will take this a step further for LBB by taking this initial approach and linking life events to services, channels and customer groups. We will feed the themes into customer interactions, through business rule led forms and scripting. This will also be the basis of our solution to build upon the three service and customer groupings operated within the Contact centre around People, Street and Property.

| Theme | Grouping | Services | Theme | Grouping |
|---|---|---|---|---|
| **Me** | Help paying bills | Council Tax and Housing Benefits | **My Street** **My Barnet** **My Community** | Problem in the area |
| | | Free School Meals | | |
| | | Council Tax | | |
| | | Parking Fines | | |
| | | Debtors accounts | | |
| | Change of circumstances | Registrars | | Problem in the community |
| | Health and support with living | Adult Social Care | | |
| | | Parking Permits | | |
| | | Housing needs | **My Business** | Help in starting/ running my business |
| **My Family** | Health and support with living | Adult Social Care incl Blue Badges | | |
| | | Childrens Services | | |
| | | Food safety | | |
| | | Parking Permits | | |
| | | Housing needs | | |
| | Change of circumstances | Registrars | **My Home** | Change of circumstances |
| | Help paying bills | Free School Meals | | |
| | | Council Tax and Housing Benefits | | Problem in the home |
| | | Council Tax | | |
| | | Parking Fines | | |
| **My Leisure time** | Things to do in leisure time | Libraries | | |
| | | Leisure facilities | | |
| | | Tourism | | |
| | | Parks | | |
| **My Council** | Wanting to vote | Elections | | |
| | Need to speak to officer | General | | |
| | Don't know who to speak to | General | | |

**Figure 15 - Themes and how they relate to life events and services.**

## Customer tasks

Customer tasks are those that large numbers of customers are trying to complete on a daily basis, such as changing their contact details. Our experience tells us that when these tasks go wrong, they drive large and costly failure demand into the service, with considerable downstream cost implications, as well as considerable frustration for the customer.

Our approach draws on SOCITM's analysis of these top tasks, and their 2012 Better Connected guidance that recommends that "the design of the [service] should be focused on top tasks". SOCITM have identified the following as an initial, generic set of top tasks, based on quantitative analysis conducted by Gerry McGovern, who is widely regarded as the number one worldwide authority on helping organisations create more customer-focused websites, across a range of local government organisations. These tasks reflect the most popular tasks customers are trying to complete through the council.

| TASK | DESCRIPTION |
| --- | --- |
| 1 | Apply for a council job |
| 2 | Comment on a planning application |
| 3 | Find winter gritting routes |
| 4 | Find rubbish collection day |
| 5 | Pay a parking fine |
| 6 | Pay council tax |
| 7 | Renew a library book |
| 8 | Find out about getting help at home |
| 9 | Find out school term dates |
| 10 | Find opening times for local swimming pool |
| 11 | Find records office opening hours |

We have worked directly with Gerry McGovern to implement key task analysis and subsequent content rationalisation on NHS Choices, which we operate for the Department for Health. We will draw on this experience, and take a pragmatic approach to prioritising a set of customer tasks appropriate to Barnet, for both internal and external customers. We will map each task from the customer's point of

view, and identify issues to resolve and opportunities to innovate and to accelerate self-help and self-service.

### 1.5.5  MULTI CHANNEL ACCESS

As part of our customer access strategy, we will implement multi-channel access, providing customers with a relevant set of access points, all of which are presented through a consistent approach to customer interaction. These will provide customers with a choice of access methods, allowing them to access Council services at a time and in a manner that suits them.

The diagram below details the customer interaction points across our solution and how the channels, services and technologies interact.
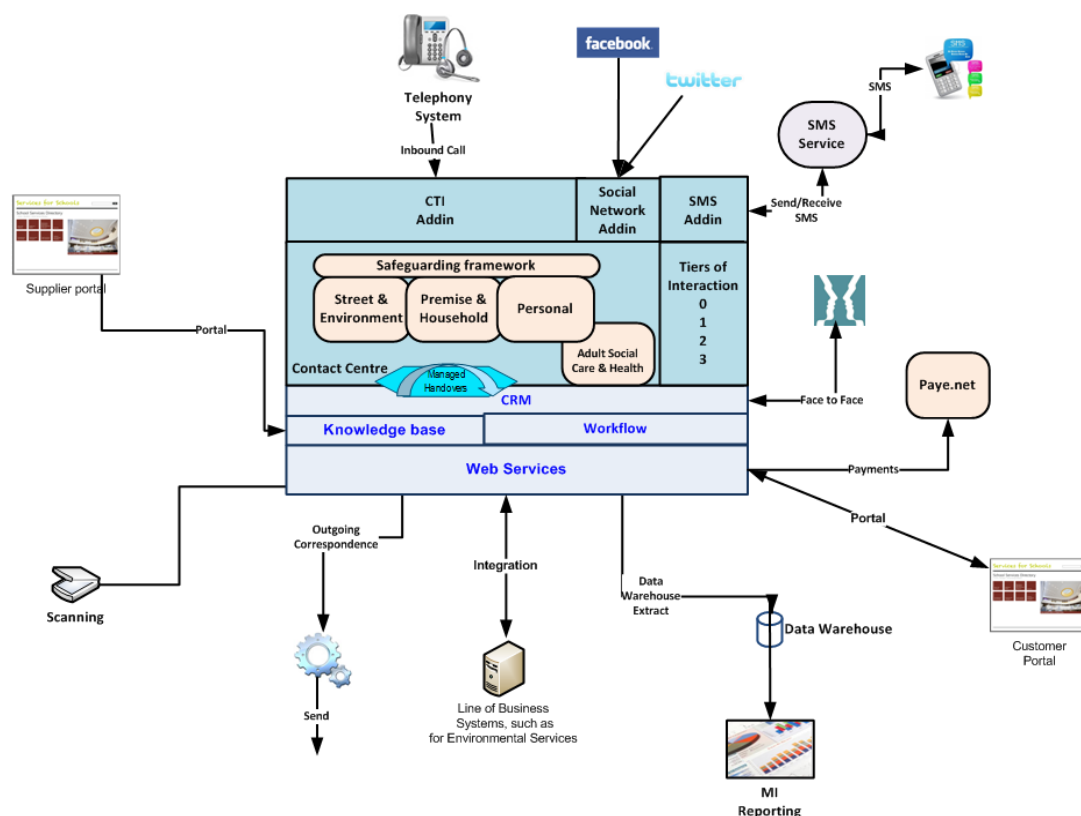


**Figure 16 - Customer Interactions**

The channels within our multi-channel solution include:

- Telephone

- Mobile

- Self-help and Self-Service

- Face to Face

- Post and Fax

- Social media.

This approach will enable us to take a view across all channels, to understand their interrelations and how customer interactions are changing, as we implement and drive self-service and channel shift, continuously nudging customer behaviours towards cheaper channels.

Our response to your requirements in Section 2 and our Supporting Technology Section 4, describe these channels in more detail.

## 1.5.6 CHANNEL SHIFT

Our Insight shows that citizens and businesses in Barnet already have a high propensity to access web-based services. We will further promote this and other self serve channels, encouraging customers to help themselves and therefore reduce the volume of contact through other, more expensive and resource intense channels.

We will encourage and, in some instances, prioritise the use of self-service technologies (portal, knowledge base, mobile) where appropriate. This will vary according to customer groups and services, with particular sensitivity to the digitally excluded. For example, it may be appropriate for customers such as students and businesses to be requested to use online contact channels. Equally, we will look to mandate the use of self-service for certain business rule driven activities for staff in their day-to-day work.

We understand that customers will need to be taken on a journey regarding channel shift and the diagram below highlights the key stages to this:
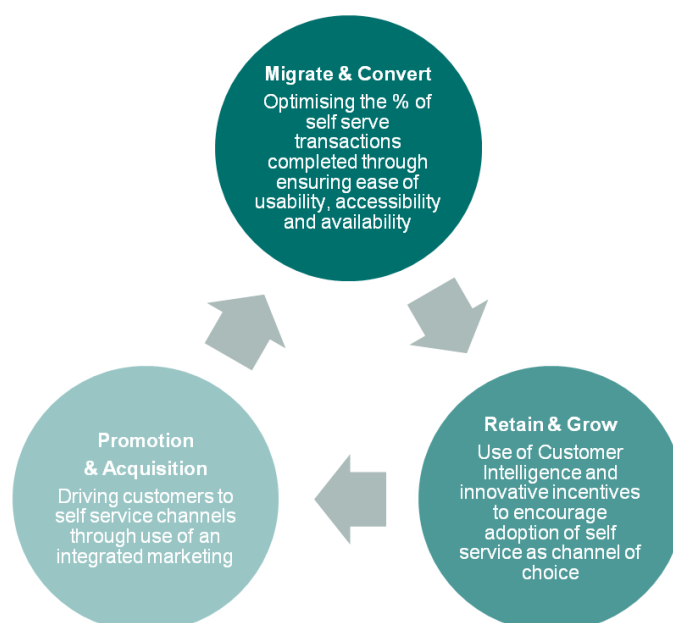


**Figure 17 - Channel Shift Journey**

From our experience, there are **Critical Success Factors to achieving Channel Shift**. These are appropriate to all channels and services and are highlighted below:

▪ We will work with the Council to identify the correct **corporate strategy (Council and NSCSO wide) and timeframe for driving channel shift** - from incentivising it in early stages, to key target adoption customer groups, through to mandating it

over time for key services, tasks and customer groups, while understanding and taking into account the needs of groups with specific equality and diversity needs. For example, skip licenses were made only available through on-line application for Birmingham City Council businesses

- We will **design effective services** that fit into the Customer's life, according to the way they approach a given task. This will be a continuous activity delivered through our Transformation Programme, as well as through Customer Services as part of business as usual continuous improvement, all utilising our Insight Engine

- We will provide customers with **personalised support** to enable them to cut through to the content and transactions they need and to quickly achieve a positive outcome

- We will **co-design our services and channels to guarantee usability**. A key design principle is to **make self-help simple** to ensure customers are able to use it without resorting to more expensive channels, such that they will continue to use it as the convenient 'channel of choice'

- We will leverage the experience and expertise of our Insight and Channel Development Teams, to **continually improve the form and function** of our self-help channels, bringing to bear the disciplines of service design, which include user-centred design, interface design, information design and graphic design

- We will **intelligently promote and refer customers across channels**, as well as to service providers within the EcoSystem, building channel shift into day to day operations, as well as into the objectives of all Customer Service staff

- We will support service areas in maintaining **factually accurate and stylistically consistent content**, underpinned by a single Multichannel Service Style Guide, to ensure the content gives Customers a high degree of confidence and reassurance, such that they do not feel the need to call in. The style guide will provide guidance around a 'house style', which is consistent with the Council's brand and corporate communications guidance and that sets out 'tone of voice' and preferred language, within a rationalised range of content formats, including articles, images, tables, diagrams etc

- We will work with the Council to develop **coherent channel shift campaign messages** that focus on the benefits of improved customer service and not reducing costs

- We will **drive customer and employee self-service take-up simultaneously**, co-designing with the different stakeholder groups and using feedback to further refine and continuously improve

- Through Transition and Transformation, we will have a variety of approaches to launching services, which will include an approach where we will **launch with services where we are already experiencing high levels of customer contact**. This will help towards us achieving our channel shift targets at the speed required and also enable us to test and refine our approach

- We understand that everyone within the organisation, but in particular Service Managers, are **key to opening the door** to embedding and achieving channel shift and volume reduction targets and we will work with the Council to involve Service Managers in co-design, engaging with them and gaining their buy-in, securing their support and positive promotion

- We know it is crucial to make **someone accountable for take-up of self-service channels**. This will therefore sit with the Operations and Commercial Director, supported by the Design Authority. We also know it is critical for these to be focused on within personal objectives and will do so for all of our staff.

## 1.5.7  SELF-HELP

Enabling customers to self-help is one of the aims of the Council and a key part of our solution, with the benefit of satisfying customers who want to and are able to help themselves. It also supports:

- Reduction in demand for services in areas where we can signpost people to Partners and Community Groups

- Offering alternatives where the Council does not provide the service

- Managing demand where this is required by service areas

- Provides a route to services provided by other organisations and groups where the customer is not eligible or if they can be supported through signposting.

Our insight shows that Citizens and Businesses in Barnet have a high propensity to self-help and there is a high proportion of the community which volunteer, both of which support our approach for self-help. We understand self-help is not just about the web/Internet and our solution approach to self-help across the channels within our Channel Access Strategy is described below.

**Multichannel Self-help**

- We will have a **coherent, corporate strategy and timeframe**, which includes **continuous improvement**

- We will **design effective services**, with **personalised support**, which is **flexible**

- Usability is key - we will **make self-help simple,** with factually **accurate** and stylistically **consistent content**, underpinned by a single **Multichannel Service Style Guide**

- We will intelligently **promote and refer customers** across channels

- Our **campaign messages will focus on the benefits** of improved customer service

- We will **drive customer and employee take-up simultaneously**

- We will launch with services where we are **already experiencing high levels of customer contact**

▪ We understand that **Managers within Service Areas/Delivery Units are the key to opening the door** and will engage them through co-design and through service management

▪ We will have someone **accountable** within the NSCSO, in conjunction with the Council, **for take-up of self-service channels**, namely the Operations and Commercial Director.

### Website Self-help

In order to improve the customer experience of website self-help, there are a number of key design elements to be considered to ensure fulfilment of their request to the extent that they don't feel the need to call in. The approach we will take to design is detailed below:
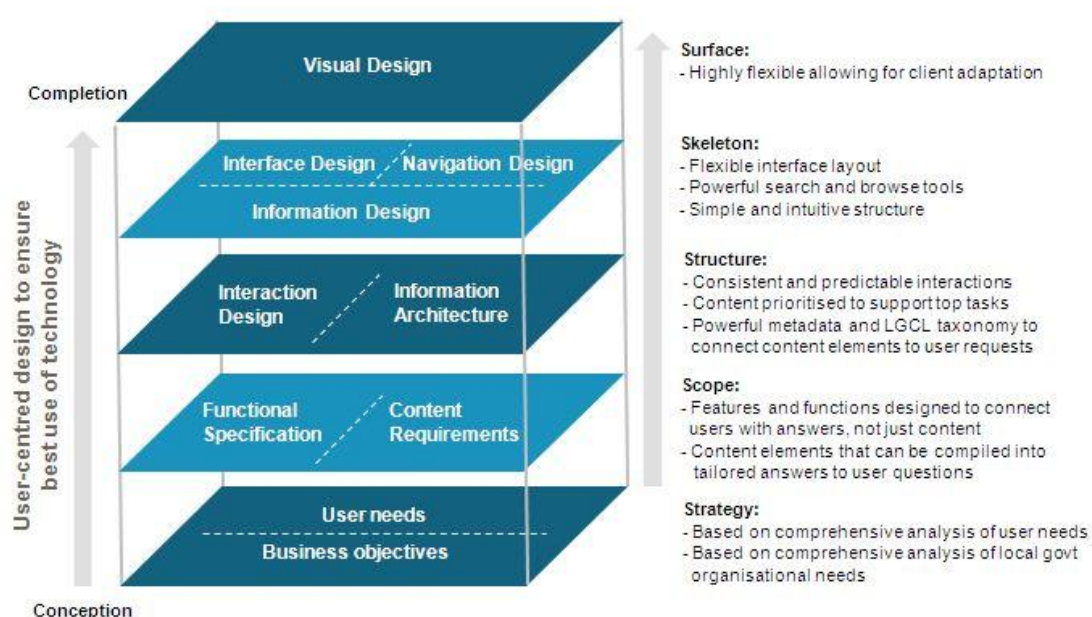


**Figure 18 - Web self-help design approach**

▪ **Visual design** - to ensure the website is visually engaging and reinforces the LBB brand guidelines, with the correct use of imagery, font and white space

▪ **Interface design** - to allow for a fixed but flexible range of page templates for internal authors, balanced with the customer's need for predictability and coherence. This will include developing device-agnostic interfaces to support usage through tablets and smartphones

▪ **Navigation design** - to help users find what they need, whether by browsing or searching, and to ensure they are orientated within the site at any point

▪ **Information design** - establishing the appropriate information formats for conveying knowledge to website users, such as diagrams, images, articles, case studies and video. Providing guidance on the appropriate use of each

▪ **Interaction design** - ensuring that the website responds predictably to interactions, such as posting clear and meaningful error messages within transactions, or the mechanism for expanding and collapsing menus

▪ **Information architecture,** so that customers can quickly and intuitively identify content using their own lay terms, in a structure that makes logical sense to them. As opposed to what makes sense to us as service providers.

### Telephone Self-help

We will increase the number of tasks customers can complete via telephone self-help, therefore reducing the need for agents to handle all inbound telephone contact. Key to this are the following technical solutions, which are discussed in further detail in section 4:

▪ Natural language - calls will be routed to individuals or teams, based upon established business rules

▪ Deployment of touch-tone telephony, where IVR 'push-button' is used to capture information and make payments.

### Face to Face Self-Help

Through our aim to refocus face to face service delivery, as described in our approach to requirement CS003 below, we will direct customers who visit any of the our face to face service locations to self-help options, with a view to them not needing to visit in the future and using self-service options for other activities. Vulnerable customers will of course receive the appropriate services face to face. Self-help options will include:

▪ Hot-line telephone lines, allowing customers to call the contact centre while in the face to face locations

▪ Mediated self-service, with the aim of showing customers how to use self-service, aiming for them not to need to visit in the future, or for them to return and self-serve there in the future.

### 1.5.8   INTERACTION CONSISTENCY

Through our process design, we will deliver **consistency across the interactions we have with customers**, through the way in which we use tools such as knowledge management and CRM and in particular how we group types of customer interactions and respond to these throughout the channels. For example:

▪ **Providing information and advice and sign-posting** - these are 'simple' interactions which can be handled through business rules and knowledge and we will therefore promote self-service as much as possible

▪ **Receiving information** - this includes gathering information from the customer into our CRM and Insight engine to use during further interactions and to aid **life event journeys,** aiming to reduce the number of customer interactions required. Staff will be trained in empathy as well as understanding underlying needs to ensure we gather all pertinent pieces of information and share these appropriately across services

- **Making bookings and appointments** - we are aiming for resolution of an enquiry during the contact, reducing the need for appointments. When appointments are required, providing customers with advice as to what information they need to have with them

- **Taking payments** - through our PCI compliant solution

- **Service Requests and Reporting incidents** - capturing required information within CRM across all channels, using scripts which are structured by life events and customer group propensity through insight, all trackable through workflow

- **Assessment** - initial assessment information will be taken through all channels, with the focus on increasing self-service and information, advice and signposting and self-help

- **Complaints** - to be handled within the corporate policy and managed through CRM.

Details of how each channel will be delivered are described in the Delivery of Requirements section 2 below against the specific requirements.

## 1.6 SUPPORTING AND ENABLING OUR CUSTOMER ACCESS STRATEGY

There are several elements of our overall solution that are key enablers to ensuring the successful implementation of our Customer Access Strategy.

### 1.6.1 INSIGHT

The Insight Engine is a core element of our overall solution - further detail can be found in Schedule 41 and in our Enterprise Wide Insight and Transformation Method Statements. We will gather information from a wide variety of internal and external sources, analyse the data and use it to develop strategies, transformation projects, new service offerings, training and development needs. This Insight will provide the Partnership with a rich picture of context and opportunity through an integrated framework of data analytics, performance management and review, and a variety of mechanisms to encourage and support the capture of ideas and insight from all stakeholders. How this will work is pictured below:
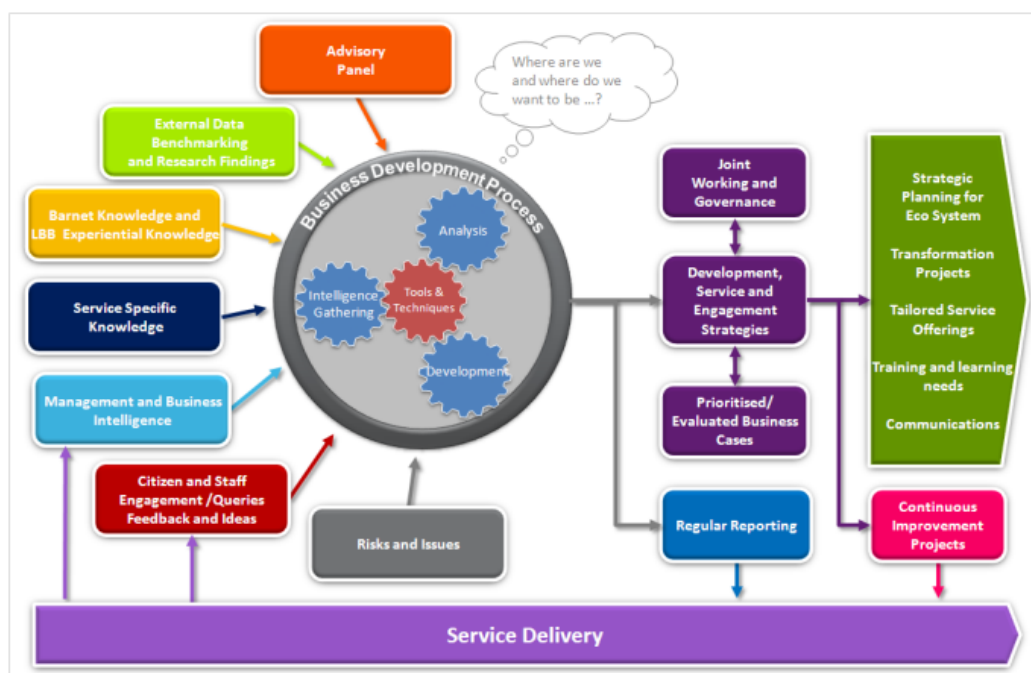
**Figure 19 - The Insight Engine**

Using Insight, we commit to driving One Barnet outcomes as follows:

- In the immediate and short term, we will use Insight to tailor and personalise multichannel interactions with individual customers - bringing to bear data about them and customers like them, so that we can anticipate and better meet their needs

- In the medium term, month-to-month, we will use Insight to:

  - Identify the needs and preferences of customer groups and to identify opportunities to improve and evolve the supply of relevant services, both within the Council and in the EcoSystem

  - Inform service design (for in-scope Services, Council retained services and commissioned functions) to support service development

  - Enable commissioning function maturity

  - Develop strategies, business cases, campaigns and communications that drive behaviour and perception change

  - Build up our single view of the customer, inputting data into and feeding our Customer Relationship Management system and our analytics suite

- Over the longer term, year-to-year, we will use Insight to challenge our assumptions about the overall Service Delivery Model and underlying Operating Model, and to introduce appropriate and innovative ideas. For example we will question:

  - If new channels are required and if old channels need to be decommissioned

- Is our response to customers appropriate for a new and growing customer segment?

- What additional suppliers do we need to factor in to cater to shifts in Borough demographics?

As detailed within Schedule 41, the Insight Engine will incorporate the exclusive collaborative insight partnership between Capita and O2 (Telefónica UK Limited) including:

- The SmartSteps insight tool, providing understanding of local areas within Barnet based upon O2 network traffic, analysing small geographic areas by time day, by network users demographics and their previous location. Example applications of this insight include:

    - Understanding night time revellers and binge drinkers, where have they come from; support and track behavioural insights/ social marketing around behaviour change

    - Impact of parking charges – hard evidence of high street users to complement/ counteract the voice of the retailer

    - Understanding the residential estate – hour by hour population behaviours within the housing areas

- Collaboration to investigate the potential further exploitation of data passing over the O2 networks such as calling data, message content analysis, and browsing details.

This will, in turn, also support our development of life events, service groupings and signposting through highlighting community groups/organisations for the customer to link to.

## 1.6.2   SERVICE AND CHANNEL DEVELOPMENT TEAM

Our channel development team is an important element of our solution for customer services. They will work closely with our Insight team to shape the design of our channels and services, thus enabling the customer access strategy in the medium term, and continuous improvement and innovation in the longer term. We describe in section 3.3, how this team will also interact with the retained services regarding the outcome of assessment of data and through regular engagement sessions.

Their key responsibilities will include:

- **Maintaining a single version of organisational knowledge** – maintaining and developing useful knowledge management tools to support those that serve customers. By bringing together all formal and tacit knowledge, and structuring it according to a logical information architecture, we will improve the likelihood that consistent advice is given, thus reducing consequent failure demand

- **Maintaining the web portals and website actions** (as per the 'Website Transformation Project - Development and Business As Usual task definition' document) – overseeing adherence to and improvement of the Content Maintenance Framework (including Multichannel Service Style Guidelines), and

working with the population of editors and authors to ensure their needs as content providers are being met, whilst reviewing web analytics

▪ **Working with the Council Communications Team** to shape and execute channel shift strategies and campaigns and develop cross-working web governance

▪ **Working with the Insight Team** to continually review and assess operational and customer data, participate in co-design exercises, and implement new service developments such as: new CRM scripts, integration of life event touch-points, optimisation of key tasks, development of new self-serve channels such as social media, through engagement with the Council's senior officer of Communications

▪ **Identifying opportunities within customer interactions to signpost to the wider EcoSystem** – engaging with partners, organisations and communities to ensure adherence to quality guidelines and appropriate use of information, advice and signposting

▪ **Developing and maintaining an opportunities log for continuous improvement and innovation**.

### 1.6.3 ECOSYSTEM AND SIGNPOSTING

An essential part of our solution is the supply EcoSystem of public sector bodies, businesses, charities and volunteers across Barnet. This will be supported by a Strategic Commissioning Framework and will facilitate the Council's ambition to become a commissioning authority. This will be key to delivering one public sector as an insight-driven service delivery solution and will allow effective cross-organisation working and shared services focused on citizen needs, with the aim of developing a single programme of support for individuals, over time.

We will work with community and voluntary organisations to stimulate, leverage and increase the capacity within the EcoSystem to deliver services. Our approach is described in detail in the Procurement Method Statement.

As the NSCSO partner, we will shape the EcoSystem to the benefit of the Council and its customer base. This will be achieved through:

▪ A co-design approach to determine how best to design or re-design services, including those delivered by suppliers, to meet that need

▪ Recognised business process re-engineering techniques (such as LEAN and Systems Thinking) to establish the most efficient way of putting that into practice

▪ Procurement/ commissioning to identify/enable the most appropriate delivery partner(s).

This is described more fully in the Transformation Method Statement.

The EcoSystem will enable citizens, businesses and communities to share responsibility, and signpost customers to support that is available to them elsewhere, not just from the Council but, for example, from other parts of public sector at national, regional or local level, or from the community itself through community organisations and self-help groups. This will enrich the customer experience and

support the Council's aim of using the 'front-door' of Customer Service to manage the demand for back-office services, encouraging and enabling customers to self-help where possible.



**Figure 20 - Customer Access to EcoSystem options**

Our Insight and Service and Channel Development Teams will work closely with Council service delivery units to develop rules that govern the customer journey across the channels and identify opportunities to signpost customers to support or services in the wider EcoSystem where appropriate (for example highlighting community organisations that may be relevant to the customer situation, or providing links to national support services such as NHS Choices and Carer's Direct). Customers will be encouraged to take up preventative services, contributing to the management of future demand.

### 1.6.3.1 Maximising Opportunities from Central Government for the Benefit of the Borough

There are a number of areas within the Customer Service solution where we will maximise opportunities from Central Government for the benefit of the Borough and signposting is key to this.

As described above, we will signpost customers (Citizens and Businesses) during interactions, across all channels. Examples include signposting to:

▪ NHS Choices - the online 'front door' to the NHS through the country's biggest health website, giving all the information you need to make choices about your health

▪ Carers Direct - information, advice and support for Carers

▪ Money Advice Service - a one-stop shop to help people manage their finances

▪ BIS Growth Accelerator - a new programme helping England's brightest businesses achieve their ambition and potential.

## 1.6.4 INSIGHT AND ECOSYSTEM WORKING TOGETHER

Our Insight Team will work with our BI/MI team to identify tactical and strategic proposals to make interactions more efficient and to help shape future service design in both Council service areas, and within the partnership. The Channel Development Team will then implement agreed changes that will affect interactions across all channels, including the update and maintenance of knowledge, scripts within CRM (including business rules and life event structures).

After the changes are made, the Insight Team will measure their impact and report back to the Council service areas and the Service and Channel Development Team of their impact/success. This is a continuous and a process which is 'alive', requiring co-design at regular points for more fundamental changes.

We have assumed that Council services will continue to maintain their directories of services such as Social Care Connect (your Adult Social Care and Health online directory), or the Childcare directory (under Find Childcare). We have assumed that the normal authors in the Council's retained services will continue to be responsible for content of directories e.g. adding/deleting entries in accordance with the agreed website development and BAU tasks.

Our federated search capability will enable knowledge to be gleaned from wider EcoSystem delivery partner sites (for example CommUNITY Barnet database of local community organisations).
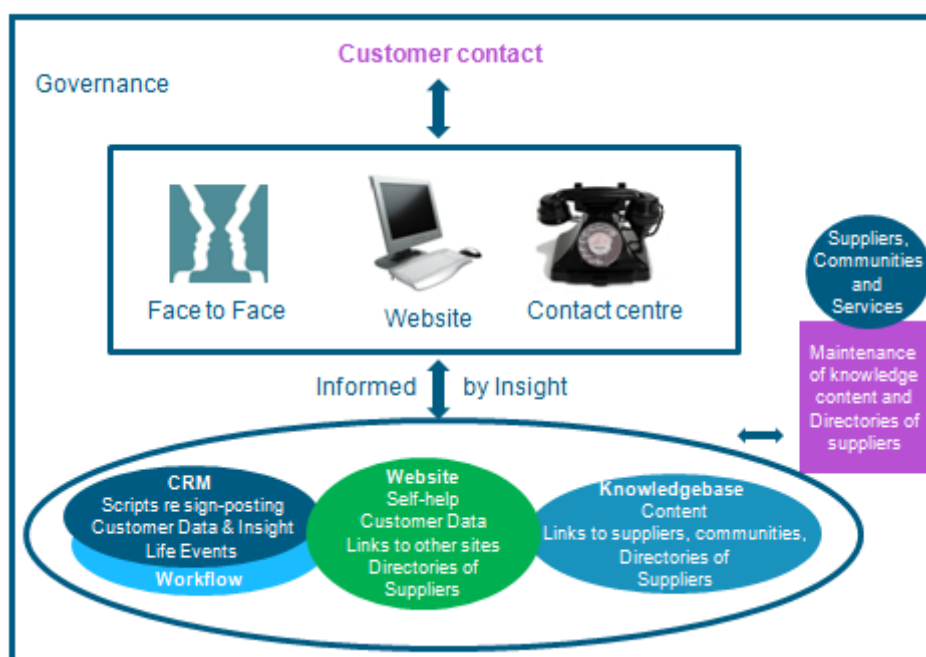


**Figure 21 - EcoSystem Signposting**

In developing specifications and contracts for new services, our Procurement team will work with Council commissioners to consider how suppliers fit within the overall delivery EcoSystem, including consideration of provisions to facilitate collaborative working, effective information exchange, and a seamless customer experience. This will ensure compliance with the overall Customer Access Strategy and interfaces with

the customer services organisation and infrastructure to enable effective delivery of information and advice, customer advocacy and case management.

### 1.6.5  CO-DESIGN

Co-design is fundamental to our approach and will be across all of our services, allowing us to collaborate with customers, ensuring our new solution meets their needs and encourages confidence in using new channels, supporting the relentless drive for efficiency. It is described in more detail in the overarching Transformation Method Statement.

In order to understand our customers, we will use a range of tools, including focus groups, ethnographic studies and in-depth interviews. These will combine with quantitative data to provide rich insight as to why customers interact with the Council in the way they do.

This Insight will feed the creation of personas (as referred to earlier), fictional characters representing various customer segments. These will become widely recognised within the organisation and be used to drive customer journey mapping sessions and subsequent design decisions by the Channel Development Team.

We will test our services directly with customers, using prototypes to understand their impact on day-to-day lives and refining our solutions until we gain confidence that the service will drive appropriate changes.  Wherever possible, we will engage with customers through existing Council forums, such as Ward Committees, Groups for Adult care and our Advisory Group, or otherwise establish new forums, using technology such as 'crowdsource' voting systems to further iterate and innovate the service.

Once our transition and transformation activities are complete, customer services will continue with co-design activities, using this as part of our approach to continuous improvement. This will enable us to develop and maintain an opportunities log for continuous improvement and innovation, informing our 'Phase 2 for customer services' and compiling data to substantiate business cases.

## 1.7  SERVICE SPECIFIC STRATEGIES

We will work with all Council service delivery units on an ongoing basis to understand their specific service strategies and required outcomes to ascertain how customer services can support these. An example of where we have already started to do this is in the area of Adult Social Care and Health.

### 1.7.1  ADULT SOCIAL CARE AND HEALTH

Our approach for delivering customer services for Adult Social Care and Health (ASCH) aligns with our overall approach to all services.

**Information Advice and Signposting**

Business rules and content will be continually reviewed in partnership with the delivery unit and the channel development team to ensure they reflect the service's strategic goals, ASCH's commitments to residents, and are consistent across all channels (with self-service being the channel of choice wherever appropriate). Our knowledge management solution will ensure that the content available on the web is

consistent with the content available by telephone and any face to face or white mail channel. More information on this can be found in section 4 within our Technical solution and our ASCH Investing in IT submission

In line with the overall customer service approach, we will verify whether the customer who has made contact has an existing record before proceeding, where this is appropriate to the interaction presented or customer group. We will provide personalised content relevant to the context of the interaction and customer, as described in section 1.6 customer access strategy. This is based on the rules engine approach which understands the context, in line with the single view of the customer, to provide the appropriate information regarding the customer and their interaction. This will also assist with promotional campaigns and our aim to direct customers to information that may be most relevant and self-help.

When providing case-specific information we will carry out ID and verification in line with Council policy.

## Assessment and Referral

Assessment and referral processes will be carried out in line with Council policy by professionally trained (through the Institute of Customer Service) customer service staff, overseen by qualified and registered supervisors. This is in-line with the current approach taken following the move of Adult Social Care Direct into the contact centre. We will use our CRM system and our Business Process Management system to manage the interactions, hand-off and update systems as required, as described in detail within our Technical solution, Section 4.

In line with the CSO future operating design, a number of tasks that are currently completed by the Social Work function will be delivered within the CSO, such as case closure following post enablement discharge and call backs.

As part of the Investing in IT project, we will develop on-line self-assessment forms, allowing customers to understand their level of eligibility for services and the criteria applied to decisions. Also included will be a signposting function, directing customers to relevant organisations and communities able to support and advise them.

## Safeguarding

We recognise that contacts relating to safeguarding issues can be received across the whole of Customer Services and not just by the Adult's team. We will therefore ensure that the same safeguarding standards, such as the Barnet Safeguarding Standards 2011, are applied through the entire Service and across all channels, during both open and out of hours periods.

We will take the same approach to contacts made at any time, recording all calls and automatically notifying the registered social worker on duty of any potential safeguarding issue arising from a call, email or white mail correspondence. We recognise that calls of this nature may need to be treated in different ways but the key elements are collecting all necessary information and handing off to the safeguarding process as soon as possible,  ensuring we receive confirmation that the safeguarding team has received our handoff.

Our contextualised approach to web contacts will also enable relevant safeguarding content to be displayed when there is potential for the interaction to be related to a safeguarding matter. As an example, should a customer be searching for information relating to "abuse", relevant safeguarding information will be displayed, including advice to contact the safeguarding team as per the content provided by the Council.

Section 3 describes our approach to ASCH staffing.

## Current strategy of ASCH

Our ASCH CSO solution will support ASCH to achieve some of its key outcomes that have come through the Investing in IT project dialogue.

The following targeted outcomes have been discussed in dialogue. We understand they will be required to be supported by customer services and we are developing these further within the Investing in IT project:

- **Better demand management (Divert, Defer, Deny**) – our single view of the customer will allow us to understand the propensity of a citizen to be able to self-manage and fund, allowing us to quickly arrive at the right outcome from the contact. This will be supported through our provision of information and advice, signposting and initial screening methodology

- **Creating opportunities for citizen self-management** – appropriate online forms content and tools to support citizen choice and self management

- **Greater efficiency and productivity across the social care system** – through our technology and knowledge management system, hand offs and knowledge will be delivered to the wider Social Care department more efficiently. In addition, through the single view of the customer, Social Care professionals will have more Insight on the customer in advance of their initial contact, including information on their contact with the Council to date.

- **Shared care record that will enable multi-party data sharing** – as part of the wider CSO solution (included in the ASCH Proof of Concept), we will establish My Account, which will support the Shared Care Record. The diagram below demonstrates how the Shared Care Record would fit into the My Account solution.
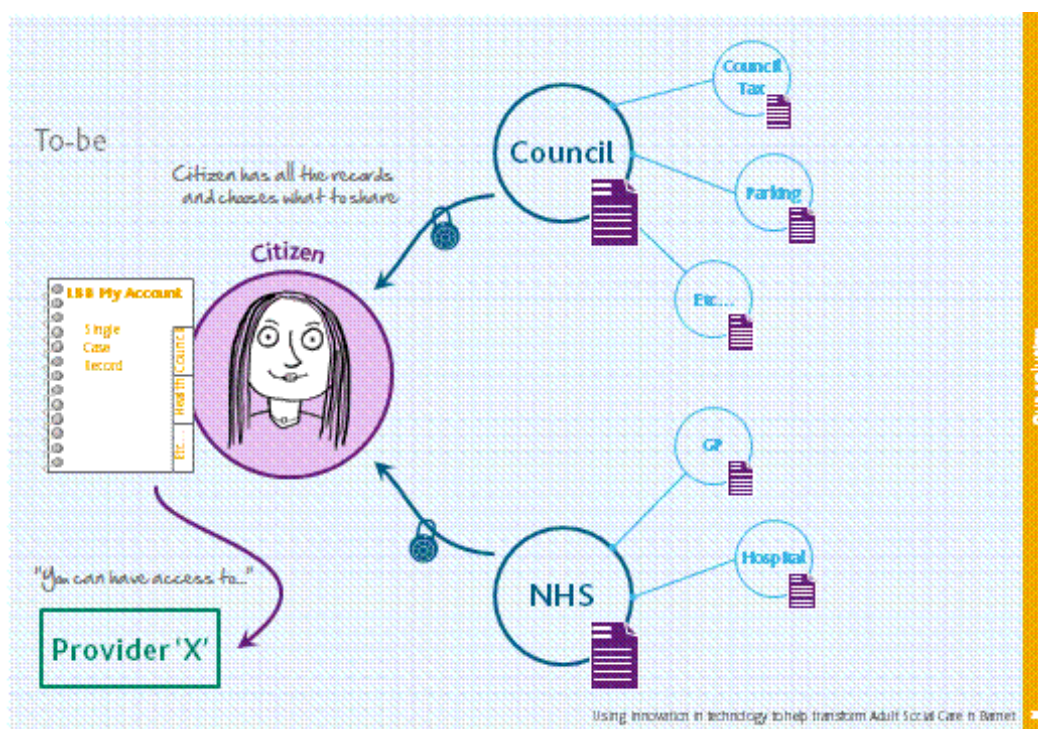
**Figure 22 - ASCH Citizen Record**

## 1.7.2 ENSURING CONSISTENT CUSTOMER EXPERIENCE WITH DELIVERY UNITS AND PARTNERS

The NSCSO will be established as the advocate of the customer and the custodian of customer engagement and experience. There are elements of our solution which will enable this seamless approach irrespective of Delivery Unit or Partner, including:

- Establishing a single customer view

- Establishing joint working groups

- Establishing approaches to engagement with services and partners Agreeing and monitoring service level agreements and performance for escalation and workflow

- Delivering appropriate levels of integration and access to systems including our single customer view

- Continuing to engage with Services and partners throughout the design and implementation of the new solution and during business as usual

- Developing a multichannel service style guide to underpin how the user experience is designed and delivered. It will inform:

  - The way services are presented across multiple channels

  - The way we, the Council's delivery units and delivery partners (including the DRS provider), behave when interacting with the customer and the way we all operate as a single team.

The diagram below illustrates the touchpoints across the technical solution for Customer Services and partners.
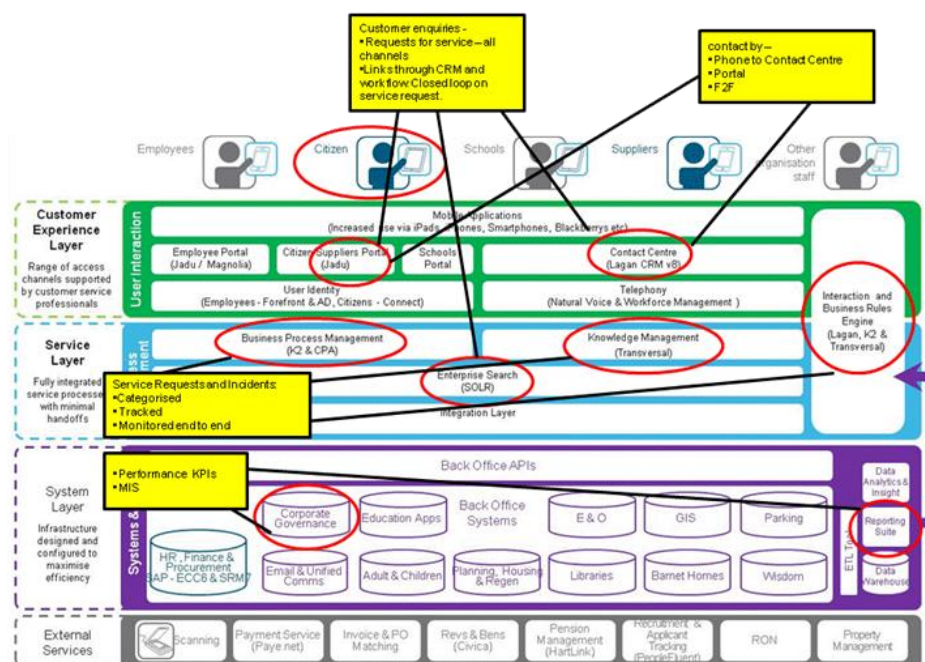


**Figure 23 - Technical Platform showing Customer Service Touchpoints**

Our approach to managing the performance and engagement with Delivery Units and Partners is detailed within Schedule 40, Managing Agent, enabling a holistic approach to customer engagement and experience.

## 1.8 FUTURE STATE

Below are some examples which bring our proposed solution to life, describing specific elements of our solution, how these will impact the citizen or employee and the context for why this is appropriate for Barnet.

### 1.8.1 CONSOLIDATED CUSTOMER SERVICE OPERATION

**What will we do?**

We will implement a consolidated multi-channel, multi-service, customer service operation, supporting internal and external customers with a commitment to resolving 85% of queries at the first point of contact and acting as the advocate for the customer across all services.

**How is this different for the citizen/employee?**

- Customers will not need to understand the structure of the Council and its partners in order to access services or information

- The Council will be the advocate for the customer, seen to be taking responsibility and accountability for service provision and service provision will be joined up

- The consolidated customer service organisation will have a multi-channel view of customer interactions and service delivery

- Through the management of demand in the front-office, back office services will see a reduction in hand-offs and an overall reduction in demand.

### Scenario example

*After the death of her Mother, Elaine knew she needed to contact the Registrar within the Council, however, wasn't clear on what she needed to do.*

*She searched on the LBB website, which provided her with clear advice and information. This included how she could make an appointment through the contact centre to register her mother's death and what information she needed to bring with her, as well as details of community groups that she could attend or join online to support her through her bereavement.*

*She was also given information to help support her father at this time and to enable him to live, supported on his own.*

*Please see the first of our Customer Journeys below, which describes this scenario interaction in more detail.*

### Why – in the context of Barnet?

Barnet has a large network of volunteers and community network which can be utilised within our EcoSystem and who support the 'self-help' vision. There are over 1,000 community groups in Barnet, which we can draw upon as part of 'packages of care' over and above what the Council can provide, as part of our EcoSystem.

It is estimated that around 40,000 volunteers bring to life Barnet's civil society, including Trustees, befrienders and advocates.

The most popular forms of delivery through the community groups are support groups, advocacy, advice and information provision, facilitating networking and training/educational facilities, which support our solution approaches for customer advocacy, info and advice, co-design and engagement, self-help and signposting.

From experience with other clients, having a consolidated, multi-channel, multi-service, customer service organisation is a critical success factor in enabling and ensuring channel shift and volume reduction savings are realised.

## 1.8.2 INSIGHT CAPABILITY

### What will we do?

We will implement an Insight capability, directly investing in technology, data analytics and skilled people to ensure services are appropriate and aligned to customer need. A key component of this will involve the development of citizen, business and voluntary organisation segmentation to create customer profiles that increase our understanding of and responses to the needs, wants and aspirations of each customer segment.

## How is this different for the citizen/employee?

- Services will be fit for purpose and Customers will feel their needs are being anticipated and met appropriately

- There will be less need to complain about the provision of services because we are meeting customer need based on their preferences and propensity.

## Scenario example

*John received an email from the Council with some information regarding changes to his recycling day. When he tapped through from his mobile to his personal council webpage, he could see the new recycling timetable for his street. He also saw a promotion for free community advice for carers. His mother in law has recently fallen ill, so he takes a look and decides to speak to his wife about a local group.*

*As well as being pleasantly surprised that the Council had remembered his request for being communicated with by email instead of post, he found the website was able to tailor content to him and where he lived. Furthermore it promoted some really relevant content that he might not otherwise have seen.*

## Why – in the context of Barnet?

The growth in the use of channels such as social media within Barnet, as well as the many areas of high internet usage, support our solution for channel shift and promotion of channels such as internet, social media and mobile. On the reverse of this, there are also areas of low internet usage and deprivation, which highlight we still need to provide relevant and focused services through channels such as face to face.

Data regarding Barnet's population and customer groups has already informed our solution and our Insight Engine will enable us to tailor the targeting of campaigns and their content to customer groups such as John's, across relevant channels. In this scenario we can infer by his age and relatives that he is at risk of becoming a carer, and that his preference for self-serve warrants a promotion of EcoSystem services via the online channel. We will build this into our tools (such as CMS, CRM scripts, knowledge) and our approach/processes (through key elements such as life-events).

From experience and best practice, we can make savings and improve customer experience through using Insight to tailor our interactions with customers, which is an approach that is becoming more widely expected by customers through their interactions with other service providers, such as online shops.

## 1.8.3 SINGLE VIEW OF CUSTOMER AND PORTALS

### What will we do?

We will implement a single view of the customer (internal and external) and their interactions with us (across the EcoSystem), linked to customer profiles from Insight. We will also implement customer portals for citizens, schools, businesses, and staff that bring together council, community and personal information and services. Members will have a dashboard of information for their Ward which they will be able to access through the staff portal

## How is this different for the citizen/employee?

- Customer satisfaction will be improved through a reduction in the need of the customer to chase the Council

- It will provide the opportunity to offer wider range of services, based on customer profiles

- Customers will be able to access and be guided to information and service provision for services relevant to them, delivered throughout the EcoSystem, in a simple and intuitive way, knowing what options are available to them if they are not eligible for Council provision.

### Scenario example

*Angela was surprised how easy it was to set up an account on the Council website and that it provided so much information relating to other organisations and community groups. She now uses this to track her requests for service. She is currently enrolling her daughter for the Duke of Edinburgh Awards and has requested an after school place for her son.*

### Why – in the context of Barnet?

Our experience supports the development of a single view of the customer as being a way to link delivery of service across Council partners and to reduce contacts through sharing information.

Portals are a proven way of 'putting things in one place' for stakeholder groups (staff, customers, etc), particularly increasing adherence to self-service internally and making it a good customer experience to ensure customers return and reuse it.
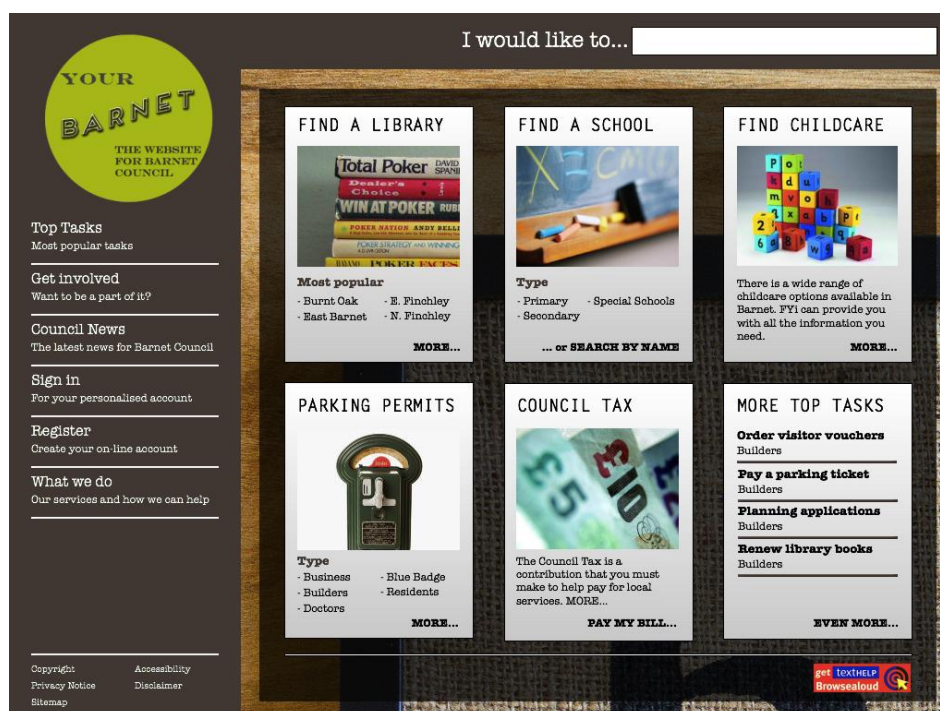


**Figure 24 - Illustration of Customer Portal**

Single view (customer and property) is also a part of LBB's vision for Customer Services.

### 1.8.4  CUSTOMER ACCESS STRATEGY

#### What will we do?

We will implement a Customer Access Strategy which sets out the approach that enables the provision of the right information to customers based on their needs, their interests and interactions through automated intelligent platforms and life events.

We will establish Service Bundles that pull together services potentially required for each Life Event. These will then be aligned with the customer profiles and other information established at point of contact to develop personalised service bundles for the customer.

#### How is this different for the citizen/employee?

Customers are understood and we proactively provide them with information regarding linked services, provided by the Council as well and its partners.

#### Scenario example

*Debbie has moved house to a property in Barnet to be closer to her new job. She is new to the area and doesn't really know anyone. She is on the internet searching for information about 'Moving to Barnet' when she's routed via a link to the Council website.*

*The page is focussed on recent arrivals in Barnet, and walks her through the key things she needs to know. She enters her postcode and the site gives her a whole range of information about local services relevant to her (parking permits, council tax rates, planning applications, library services, leisure facilities, community groups etc) and how, by registering her information now, she can 'tell us once' across the full range of services. She's happy to provide a bit more data about herself, from the comfort of her home and quickly sets up a personal account, where she can track her various applications.*

#### Why – in the context of Barnet?

Barnet has a population that has a clear propensity to self serve. By providing popular transactions through new channels and ensuring that we provide relevant and useful links at the point of contact we can not only fulfil customer demand more effectively but we can free up valuable resource to focus on customers who are unable to help themselves. The way we present information and the types of information we provide will utilise the experience built up over many years in the retail sector on both customer behaviours and matching customer queries to useful or similar service information.

### 1.8.5  CO-DESIGN

#### What will we do?

We will co-design services with our customers for our customers.

**How is this different for the citizen/employee?**

- People who use and deliver services are able to help shape them

- Staff and customers are empowered to get involved and engaged.

**Scenario example**

*Margaret and Jane were visiting Burnt Oak library and were interested to see a poster asking for residents of Barnet to join a focus group to discuss the future design of local face to face services. They agreed to attend together and gave their names to the customer help desk.*

*During the session they were asked a series of questions about the current services available, their levels of satisfaction and what they would like to see in the future. They were also able to 'play' with and comment on some prototypes of possible new technologies, which included websites and mobile applications. They felt engaged and involved and were pleased to receive an email after the session which accurately noted what discussed and next steps. They're now looking forward to going back and seeing the team's improved ideas.*

**Why – in the context of Barnet?**

The points above regarding the large community engagement across Barnet and volunteers is also relevant here, as there is already a willingness to support the community and to be involved in shaping services and how they are delivered.

A significant proportion (41%) of Barnet's residents work within the Borough and therefore businesses located in Barnet and people working within them will have a vested interest in how services are accessed and delivered.

In 2009-10, 15.9 per cent of Barnet's working age population (39,400 people) were self-employed which is the highest level of self-employment in London after Brent (16 per cent) and considerably higher than the London average (10.8 per cent).

Citizens and Businesses in Barnet are therefore a crucial part to our design process and EcoSystem.

## 1.8.6  CUSTOMER SELF-SERVICE AND SELF-HELP

**What will we do?**

We will commit to maximising customer self-service/resolution and we will provide enhanced self service capabilities enabling citizens, businesses and staff to self serve

**How is this different for the citizen/employee?**

- Specialist staff in Delivery Units can be focused on those customers who are not able help themselves

- Customers can access information and services in the way and at the time which is convenient to them.

## Scenario example

*Anne's father has suddenly had a stroke and she finds herself not knowing where to turn. The hospital provides short-term care, but as soon as her father returns home it is obvious she needs more.*

*Anne remembers one of her friends found the Council to be very informative so she decides to take a look online. There she is advised that the Council can help Anne connect to Council services and other organisations that will help - in order for this to happen she needs to describe her situation first. She runs through a series of questions to ascertain whether her mother is eligible for support and options.*

*Not only are there assessment forms, but there was a full 'Map of Care' with a series of guides regarding how to help her father get around the house, his diet, how he can stay in touch with friends, as well as how to ensure her father washes properly.*

*Anne is also surprised to be provided with help and advice for her through links to other carers and community groups.*

*Please see the second of our Customer Journeys below, which describes this scenario interaction in more detail.*

### Why – in the context of Barnet?

Barnet's age profile between 2011 and 2016 is forecast to develop in the following ways:

- Significant increase in 5-14 year olds (+6,600). This includes 23 per cent more 5-9 year olds projected by 2016. This young cohort is the fastest growing group in the borough

- General decline in 30-34 years olds (-1,000, 3 per cent) and slower growth in 25-29 year olds (600, 2 per cent)

- Sizeable growth in 40-59 year olds, especially 40-45 (+2,200, 8 per cent) and 50-54 (2,400, 11 per cent) cohorts

- Sizeable growth in 65-69 year olds (+2,100, 18 per cent) and proportionally significant growth in 90 plus cohort (17 per cent).

The last two points, highlighting growth in over 40s and over 65s, has become the focus of the work we are doing with ASCH, where the requirement and vision is for demand management as the Council will not be able to provide care for the whole population.

Our solution embraces this through focusing our customer interactions, informed by our Insight engine, to provide people with information and advice, tools through self-service channels and signposting to enable them to self-service and self-help.

Our solution is also built upon recognising the 'underlying need' of a customer, aiming to support the Council's vision of preventing service need. To achieve this, we will link our solutions to services such as leisure and signposting to other organisations and groups in areas where the Council cannot provide support.

### 1.8.7   FACE TO FACE CONTACT LEADING TO CHANNEL SHIFT

**What will we do?**

We will establish Community locations or 'Neighbourhubs' (as described in our Estates Method Statement) in locations within Barnet where citizens can easily access the full range of services available through the CSO.

**How is this different for the citizen?**

- Easy access to Council Services for those who prefer face to face contact

- Citizens will experience high levels of personal service

- An appointments system will encourage more efficient use of staff

- Staff will be able to guide those who are will and able to use the on-line service for future queries, thereby encouraging channel shift

- Insight will be used to encourage relevant groups of customers to use face to face

- Citizens can be linked to EcoSystem suppliers.

**Scenario example**

*Fred and Daphne are selected by Insight as potential users of Neighbourhubs and are sent a leaflet about them. When they come to the Neighbourhub with their concerns, they are assisted to use on-line access to overcome their fear of this. They are also helped to deal with a range of diverse issues, including re-profiling of Council Tax payments and setting up an appointment with a Small Business Advisor.*

*Please see the third of our Customer Journeys, which describes this scenario in more detail.*

**Why – in the context of Barnet**

While Barnet has a large population of customer group s who are willing and able to use self-services, there are significant numbers who are not (though research suggests they will be able to do so with some encouragement). Neighbourhubs and the use of other community facilities provide an opportunity for these citizens to get the personalised service they require and provide a mechanism, through mediated support, to start the process of channel shift.

### 1.8.8   MULTI-CHANNEL ACCESS

**What will we do?**

We will provide access to Customer Services through a variety of channels that reflect the way citizens prefer to interact.

**How is this different for the citizen?**

- Easy access to Council Services across all channels

- Consistent levels of service across channels

- An active response from Customer Services where appropriate

- Automated service fulfilment where possible

- Citizens can be linked to EcoSystem suppliers.

### Scenario example

*Andy and Laura are channel-savvy citizens, comfortable with using the web, e-mail, texting and smart phone functionality as well as the phone for contact. They use the Council's website to ask about procurement activities and complain about potholes and use the bar code reader on a smart phone to access a poster-based web link to an EcoSystem supplier. Customer Services contacts them by phone to arrange an appointment and by e-mail to confirm eligibility and their Member contacts them by phone as the result of seeing their complaint on his ward dashboard.*

*Please see the fourth of our Customer Journeys, which describes this scenario in more detail.*

### Why – in the context of Barnet

The expectations of citizens regarding access to services is based on their experiences in the commercial sector, where they are encouraged to contact companies using every available channel. We believe that philosophy should apply to the CSO also and customers increasingly expect this.

## 1.8.9 CUSTOMER SERVICE PROFESSIONALS

### What will we do?

We will provide the entire customer services team with the opportunity to become recognised customer service professionals.

### How is this different for the citizen/employee?

- Customer Service staff will be recognised as customer service professionals

- Citizens will experience a higher level of customer service.

### Scenario example

*Richard, a Customer Service Advisor, has passed his Institute of Customer Services 'Communications' award and feels proud as he collects his certificate at a ceremony attended by his Mother.*

### Why – in the context of Barnet?

We have proven experience that the development of CSO staff through schemes such as the ICS and internal recognition of customer services as a profession increases staff satisfaction and in turn, improves their empowerment and performance.

### 1.8.10 CUSTOMER JOURNEYS

To illustrate further how our proposals will have a significant impact on how customers will interact with the customer services organisation, we have provided overleaf journeys that describe:

- How we would handle a bereavement

- How we would handle a family issue

- How we envisage providing face to face contact that can help motivate customers to channel shift

- How we envisage our multi channel strategy operating.

## Elaine

**Bereavement**

| Wellbeing | Education | Housing | Wealth | Personal Safety | Environment | Engagement |
|-----------|-----------|---------|--------|-----------------|-------------|------------|

### Elaine's Situation

Elaine is 45 years old. Her mother has recently died unexpectedly. She is still in a state of shock, but realises that there are things that must be done to complete the formal process. She is not in the habit of contacting the Council.

### Experience

Elaine accesses the Council's website to find out what she must do to register her Mother's death. There she finds a large amount of useful information.

She finds details on how she can make an appointment through the Contact Centre to register her Mother's death and what information she needs to bring with her. She also finds details of community groups that she could attend or join online to support her through her bereavement.

Elaine uses the information from the website to arrange an appointment to register her Mother's death. The Advisor who makes the appointment is very sympathetic. Elaine also mentions her concerns about her Father's financial state

The Advisor provides Elaine with links to the Council and community organisations that can help Elaine support her Father at this time and to enable him to live, supported on his own. She also provides details of websites that will provide advice on bereavement and financial support.

Elaine decides to contact some of the community groups. She is impressed about the way the community groups are providing exactly the kind of support she feels she needs. A contact in one community group explains that they are part of an EcoSystem supported by the Council's partner, Capita.

Elaine uses the web links provided to access the NHS Choices site for details of Bereavement and finds a wealth of helpful health related information for herself and her Father. She also accesses the Money Advice Service, which provides useful advice on budgeting for her Father.

Elaine feels relieved that she has completed the necessary processes with minimal additional pain to herself. The community group is providing the level of support she needs and she can put in place the health and budgeting advice.

| **Website** | **Contact Centre** | **Signposting** | **EcoSystem** | **Wider Support** |
|-------------|-------------------|-----------------|---------------|-------------------|

| **Moments of Truth** | ▶ Easy access to information<br>▶ Knowledgeable Contact Centre Advisor<br>▶ Support from across the community<br>▶ More that just Council services | **Key Enablers** | ▶ Website<br>▶ Contact Centre with supporting knowledgebase<br>▶ EcoSystem<br>▶ Signposting to public health and finance websites |
|---|---|---|---|

**Figure 25 - The NHS Choices Elaine viewed**

## Anne

**Family issue**

| Wellbeing | Education | Housing | Wealth | Personal Safety | Environment | Engagement |
|-----------|-----------|---------|--------|-----------------|-------------|------------|

### Anne's Situation

Anne is 52 years old. Anne's father has suddenly had a stroke and she finds herself not knowing where to turn. The hospital provides short-term care, but as soon as her father returns home, it is obvious he needs more. Anne has a speech impediment that makes telephone contact difficult, then remembers one of her friends found the council website to be very informative.

### Experience

| Website | | Online form | Signposting | EcoSystem | Care Support | |
|---------|---|-------------|-------------|-----------|--------------|---|
| Anne decides to take a look online, where she is advised that the Council can help her connect to Council services and other organisations that will help. | Anne is requested to complete an assessment for to enable the Council to determine the appropriate services for her needs. She is sure that it will be complicated, but decides to do it anyway. | She completes the form and is impressed by how straightforward it is, with checkboxes and picklists to minimise input and pop up help readily available. | The resultant report provides a personalised 'Map of Care' with a series of guides regarding how to help her Father get around the house, his diet, how he can stay in touch with friends, as well as how to ensure her Father washes properly. | The report identifies several community groups which provide support in the areas Anne needs most. She looks up their websites and finds two which can readily provide services to support her and her Father. | The report also provides a link to Carers Direct, which is part of NHS Choices. Anne accesses the site and finds helpful information on how to set up and monitor care provided to her Father. | Ann is surprised and impressed at the level of help provided for her on-line. She feels that her needs have been understood and responded to, even though she hasn't had to speak to anyone directly. |

| Moments of Truth | ▶ Easy access to information on-line<br>▶ Simple assessment mechanism<br>▶ Map of Care<br>▶ Support from across the community and wider | Key Enablers | ▶ Website<br>▶ Online form<br>▶ EcoSystem<br>▶ Signposting to Care Support |
|---|---|---|---|

Figure 26 - The Carers Direct page that Anne viewed

## Fred and Daphne

**Face to Face contact, leading to Channel Shift**

| Wellbeing | Education | Housing | Wealth | Personal Safety | Environment | Engagement |

### Fred and Daphne's Situation

Fred and Daphne live in former Council House, bought under Right to Buy. Fred is a self employed plumber. Daphne helps with the accounts, but has time on her hands. Both are keen on recycling and Daphne enjoys gardening. Both are concerned about the impact of the recession on Fred's business and their ability to keep up regular payments.

### Experience

Recognised as potential users of Neighbourhubs by customer insight, Fred and Daphne receive a leaflet about the services on offer.

Next day, they visit the Neighbourhub. A Community Advisor takes note of their concerns, shows them how easy it is to access services via a PC.

The Advisor shows them how to re-profile their Council Tax payments and arrange Tax Credits.

The Advisor shows them how to arrange an appointment for Fred with a Small Business Advisor and get the phone number for a local Financial Advisor.

Feeling more confident, they do some surfing and find links to a number of local SMEs who have set up recycling businesses as part of the EcoSystem, helped by the Council, and to local environmental groups looking for help.

Daphne spots an advert for the Community Bank and decides that she can put some of her spare time to good use, so she signs up, indicating the types of groups she would like to help.

Fred receives an automated text message confirming his Appointment with the Small Business Advisor at the Neighbourhub.

Daphne receives a phone call from a local charity who have received her name from the Community Bank to see if she can help them.

| Insight | Face to Face / Mediated Access | | Signposting / EcoSystem | Signposting / EcoSystem | EcoSystem | Technology |

**Moments of Truth**
- ▶ Local face to face access to services
- ▶ Helping the customer self serve
- ▶ Making EcoSystem partner connections

**Key Enablers**
- ▶ Assisted Self-Service
- ▶ One contact – multiple results
- ▶ Integration with EcoSystem

**CAPITA**

## Andy and Laura

**Multi-Channel Access**

| Wellbeing | Education | Housing | Wealth | Personal Safety | Environment | Engagement |
|-----------|-----------|---------|--------|-----------------|-------------|------------|

### Andy and Laura's Situation

Andy is MD of his own building business and has lived in Barnet all his life. Laura works a few hours a week in local shop, fitted in round time with children, but is beginning to have more time on her hands. Andy employs 10 people directly and sub-contracts trades to local small businesses. He has developed expertise in pre-fabricated sustainable office solutions and has seen growth, but the recession is starting to bite. He also can't find youngsters willing to be apprentices.

### Experience

| While on the Council's website setting up his Council Tax Direct debit, Andy uses the on-line forms to ask about procurement opportunities. He also complains about potholes outside his yard that are causing damage to his lorries. | He receives an phone call the next day from a Customer Services Advisor offering an appointment at a local Neighbourhub with a Business Advisor. | At the appointment, Andy is given information about being a supplier to the Council, areas of demand for his services and about taking on an apprentice via Barnet College. | Having considered all the information, Andy applies on-line to become a Council supplier. He also calls Barnet College about taking on a potential apprentice. | While at a local Community Event at the Colindale regeneration Centre with the children, Laura notices a poster about volunteering. | She uses the bar code reader App on her smartphone to access the website link via the QR code on the poster and is excited by the range of opportunities available locally. | Andy gets a call from his Local Councillor, who's seen Andy's complaint through his dashboard, apologising and advising him when the potholes will be repaired. | Andy gets an e-mail confirming that he's eligible for the Council's e-supplier list and inviting him to a start up seminar. | After some consideration, Laura decides which group she'd like to volunteer for and calls them. |
|---|---|---|---|---|---|---|---|---|

| **Website** | **Knowledgebase** | **Website** | **Signposting** **EcoSystem** | **Technology** **EcoSystem** | **Dashboard** | **Procurement** | **EcoSystem** |
|---|---|---|---|---|---|---|---|

| **Moments of Truth** | ▶ Access to services by chosen method<br>▶ Support for local businesses<br>▶ Once contact, multiple issues<br>▶ Early intervention | **Key Enablers** | ▶ Multi-channel access<br>▶ Customer advocacy<br>▶ Partner/Procurement Integration<br>▶ Member dashboard |
|---|---|---|---|

# 2 DELIVERY OF REQUIREMENTS

## 2.1 CUSTOMER SERVICES STANDARDS: CS001

We will ensure that the Council's Customer Service Standards are adhered to in elements of the delivery of the CSO for all activity and all channels.

The detailed design of our solution will be built around the **twelve design principles** from the Output Specification, embedding these and the required service standards into our customer service operation. Below are these principles, with examples of how they will be adhered to and how they form key aspects of our solution -

- **Encouraging customers to use the most cost effective channel or choice of channels when they contact the Council** - through customer engagement and co-design of our solution and through the implementation of an improved choice of channels, including intuitive self-service (mediated where required) and a consistent approach to customer interactions across all channels

- **Ensuring customers are treated with dignity and respect** - through customer engagement and co-design, understanding the needs of customers using our Insight capability and through listening to customer feedback, building improvements into our operation

- **Delivering a consistent, high quality experience regardless of the channel type or service requested** - through having a consistent approach to customer interactions, as described in section 1.6.8, across all channels and then through working with service areas to apply a level of risk and complexity against the interaction, using business rules and according to customer needs and preferences. Our technical platform will enable us to use and maintain the same information for customers as for staff, ensuring accuracy and consistency throughout

- **Maximising opportunities for customer self service and use of emerging technologies (for self service and other approaches that enhance the customer experience and leverage efficiency in terms of savings)** - through our enabling technical solution (as described in section 4), we will deliver a choice of channels and by using our experience of channel shift critical success factors and cross-promotion of channels through implementation of our Customer Access Strategy

- **Working with delivery units and Lead Commissioners to ensure that demand for public services is reduced** - through our engagement with retained client services and Lead Commissioners, understanding their visions, strategies and required outcomes and utilising our customer service solution as the 'front door' to services, reducing demand to the back-office through agreed sign-posting and provision of information and advice

- **Ensuring insight and information from the customer experience is captured to support marketing and communication of services and is the foundation for commissioning, designing and improving delivery of public services across the borough (i.e. supports service improvement, change and transformation in services delivered by the council and other partners)** - through implementation of our Insight Engine, we will have vast amounts of data

which will be analysed and shared with services and partners. Our service and channel development team will discuss and agree areas of services which can be improved/changed/transformed. The Procurement Method Statement includes the details for how this will be a foundation for commissioning

- **Joining up Council and local public services around the needs and life events of customers by offering a holistic and personalised approach to service delivery (where appropriate). Expanding this further across all public services in the borough and for other services is part of Phase 2** - our Customer Access Strategy is predicated on understanding the needs and preferences of the various customer groups (as detailed in Section 1). Using this understanding, informed by Insight and from our best practise experience within local government and the private sector, we will deliver a holistic and personalised customer experience through developing life events, providing resolution, advice and information, as well as signposting

- **Enabling customers to resolve issues through a single point of contact within customer services and have a single view of their interactions with the Council** - through customer services acting as the advocate for the customer and by implementing a single view of the customer, which will be viewable by both customers and staff within the CSO, and will include track-able customer interactions through a Customer Account

- **Offering services and information that builds customers' capability to help themselves and others** - through the implementation of our intuitive self-service (mediated where required) and through managing demand at the 'front-door', providing information, advice and signposting

- **Enabling customers to only have to provide information once, which can be used to provide a range of related services** - through the implementation of life-events, based on customer needs and preferences, we will gather and share data across relevant services, reducing the need for multiple contacts

- **Providing a coherent brand, identity and ethos for customer services that builds a new relationship with the citizens of Barnet** - by ensuring all interactions with the CSO are clearly seen as being interactions with the Council, through delivering a set of consistent customer interactions and ensuring all staff within the CSO are trained and developed with a view to delivering services for the Council. Also through the CSO creating a new relationship with the Customer across multiple channels and services and partners, acting as the advocate for the customer

- **Complying with the Council's Safeguarding and Equalities responsibilities** - through ensuring all CSO staff are trained in compliance and have the tools, such as scripts and knowledge bases, to ensure safeguarding and equalities responsibilities are adhered to.

We will also use our **best practice experience** of transforming and running Customer Service operations across the public and private sectors, to embed these principles and standards within our detailed process design, enabling first contact resolution and increasing customer satisfaction.

We will be informed through our **operational performance monitoring** and **Insight data** of changes to customer use of channels and services in order to see how they may impact upon the service levels, predicting and making suggested changes through our **Service and Channel Development Team** during their regular engagement with service departments.

Section 5 describes how we will monitor and report performance and quality across the CSO.

## 2.2 TELEPHONY: CS002

Prior to the NSCSO, the existing Contact Centre is growing due to the LBB Customer Service Transformation, causing it to double in size, due to some existing services being extended and new services being added.

We will build upon the foundation delivered by the LBB Customer Service Transformation, providing a truly consolidated telephone contact across the NSCSO for external contacts, increasing first time resolution through use of tools such as the intelligent knowledge base, integrated systems, reducing hand-offs to the back office.

We will ensure the **telephony channel is accessible** to all customer groups through utilising telephony 'hot-lines' within our face to face locations, as well as through the rationalisation of telephone numbers, with an agreed plan on how to communicate these changes with customers, with the aim of simplifying the telephony route into the Council.

We will use Insight in a number of ways, including being able to recognise the relevant traits of customer groups, linking these to services and channels and **supporting customers with specific needs.**

The Contact Centre in Darwen will be structured into **3 groups of services**, based upon the structure being put in place by the Council through the Customer Services transformation programme. We have added a fourth team for Adult Services, located in Barnet.

- Group 1 - General enquiries,  Libraries, Street based, Highways, Environment

- Group 2 - Governance, Parking, Electoral Register, Registrars, Council Tax, Environment  and Operations (non DRS)

- Group 3 - Education welfare, Admissions, Housing Bens, Children's FYI and Youth Service

- Group 4 - Adult services which will be delivered locally within Barnet to ensure that on site professional support by LBB professionals can be maintained. This will be reviewed once the other services have been migrated.

These themes will support our solution for linking services as part of our approach to understand customer needs and preferences through life events, providing a proactive approach to customer contact and reducing the need for customers to contact the Council on multiple occasions.

We will have contact centre tools, processes and forecasted resource in place to ensure calls are answered to the **agreed standard**, as detailed within the Output

Specification will use our industry knowledge of running Local Government Customer Service Organisations, as well as our private sector experience to ensure are **adherence to legislation and compliance with best practice**, for example, OfCom and PCI compliance.

We will conduct 'Root Cause Analysis' to understand the reason for customer contact and will develop a plan to implement 'quick win' activities during Transition to **reduce avoidable contact and failure demand** and use this information to help shape the detailed design of the new processes within CRM.

As customer contacts reduce due to the above and due to the increased use of self-service, we will work with the Council to agree on an approach to rationalise the number of public telephone numbers used to as few as possible, without impacting Customer Satisfaction. Insight data will also be used to help inform this approach and it is likely to follow the structure of the groupings of services within the Contact Centre.

We will use **Natural language** technologies to route calls to individuals or teams. This will be based upon established business rules which we will develop and agree with service areas. For example, we will agree which customer contacts can be routed directly to a person and which need to be routed to a team within the Contact Centre or directly to the specialist back office team. We will also **use 'push button' IVR strategically** to provide good levels of information for Customers and to route calls to the right team, ensuring these do not go deeper than three levels.

The **opening hours of the Contact Centre** will be as a minimum 9am - 5:15pm Monday to Thursday and 9am - 5pm on Friday, not including Bank Holidays and the period between Christmas and New Year. We will review calls patterns to ascertain whether this remains the optimum time to be open and high priority services (Street Based Services, Children's, Registrars and Adults) will be covered at least from 9am - 4pm during the Christmas and New Year period. We have modelled different options for opening hours, weekend opening and different service levels and will further develop these once we have access to call profiles and discuss these with the Council to ascertain the impact these will have upon resources, efficiencies and customer satisfaction.

Through our improved telephony System, we will deliver improved resilience, with the ability to re-route calls within minutes to another of our sites. We will **review Business Continuity Plans** at least bi-annually and will update them when necessary.

Our **customer service professionals** will be trained to establish the customer's underlying need, using business rules and linking services through life events. Establishing more than the presenting need will prevent future avoidable contact and improve customer satisfaction.

The ultimate aim is for as many contacts as possible to be **resolved and responded to within CSO, without being passed on to the back-office** and for customers to be **sign-posted and supported to self-service** facilities.

## 2.3   FACE-TO-FACE: CS003

Customer service staff dealing with customers face to face are currently within three LBB locations, Burnt Oak library, Barnet House and at the NLBP building 2 reception, delivering services ranging from general enquiries, housing benefits, child protection and registrars.

Our face to face customer service solution is integral to our overall customer service strategy and has been designed with our Estates Service who have gained an understanding through dialogue of LBB's developing strategy for property and face to face service delivery. Our solution is informed by Insight and analysis of customer groups, location and services delivered enabling us to refocus face-to-face service provision to deliver only those elements that actually require face-to-face intervention (i.e. provision of proofs), and deliver to those customer groups whom are unable to access other channels.

At the heart of this is **community engagement.** Our solution for face to face contact will move the Council closer to its residents, building a new relationship with them, thus helping to achieve one of the Council's objectives. To achieve this, at Preferred Bidder we will continue to explore the benefits of bringing together the face to face solution currently operated by Barnet Homes and the solution we propose. This integration of face to face will allow us to maximise the benefits to the citizen and authority of their expertise and strong contacts with the community. It will link face to face service delivery to the Councils democratic process as well as underpin the delivery of the community advisor role to those citizens that need it.

Our face to face solution has **Community Engagement Managers**, with portfolio specialisms for Council Services and Barnet Homes, third sector and businesses and our **Youth Engagement Manager** will work with community groups to utilise and build upon their engagement, such as NUTMEG, CommUNITY, ageUK, as well as using their networks and wealth of experience with campaigns to influence channel shift and the health agenda.

In agreement with the Council, we will develop an approach of engagement through the **various layers of the democratic community**, such as Ward groups, Constituent Groups, Overview and Scrutiny and other LBB strategic forums.

Staff will be located across the Borough in face to face locations, initially within existing sites, as well as being mobile in a 'tour rep' model, through surgeries and visits, reaching out to the community. As described within our Estates Method Statement, we will adopt a 'Neighbourhub' solution, using our experience from delivering this for Birmingham City Council, with integrated service delivery hubs within neighbourhoods with high service demand.

Within our face to face locations, we will bring together other public sector bodies to provide a range of services based upon Insight data and our solution will, where appropriate, be for internal and external customer groups:

- **For the Public** - Council services which require F2F interaction (these could be activities which start through initial contact by phone/self-service, such as Housing Benefit application/claim). We are ascertaining what these are through the 'Customer Group, service and channel matrix'.

- **For Services** - Delivery of services such as Adult and Children Services, Libraries and business partners for complex cases

- **For Partners** - Co-location around a 'theme', for example, CAB, Police, Barnet Homes, depending upon demographic data and their needs.

An example of a current operation where we have established strong relationships between our Contact Centre and Face to Face operation is Volkswagen, where we manage all channels, ensuring a multi-channel approach to customers, as well as ensuring the team as a whole are involved and engaged, even if working remotely. We will build upon this best practice to ensure staff working in our face-to-face locations, truly feel part of our multi-channel Customer Service organisation. We will also involve customers in the design of F2F activities and the layout of locations through our co-design approach to service design and our links with our Estates Service.

As part of our Customer Access Strategy, we will deliver an improved appointment process (with proactive reminders) and will explore with the Council, 'appointment only' for some services/locations. We will **signpost customers to self-service** through the use of computer terminals and also provide mediated self-service for customers attending who could interact through self-service. We will also signpost customers to the 'hot-line' phones to the Contact Centre, reducing the need for face to face interaction.

We were advised in dialogue that the current resourcing for this channel delivers against the following Council requirements and we will continue to deliver this. All **customers will be met and triaged within 5 minutes**. As stated above, the aim is to reduce face to face interactions to those activities which are essential for F2F and cannot be accessed or resolved any other way. For those remaining **level 1 activities**, there will be no more than 15 minutes travel time from a person's home using public transport and for **level 2 activities**, customers will have to travel no more than 30 minutes from their home using public transport.

**Opening times** for face to face services will remain as a minimum of 9am - 5.15pm Monday to Thursday and 9am - 5pm on Friday, excluding Back Holidays and the period between Christmas and New Year. A minimum of one late night (opening until 7pm) per week will be offered to at least one face to face site. High priority services (such as Home Seekers) will be covered at least from 9am - 4pm during the Christmas and New Year period.

Based on Insight data, any proposed changes to the service, including opening hours, will be discussed and agreed with the Council

All interactions with the staff will be **'branded'** and seen by customers as interactions with the Council (this is described in more detailed within CS015). We will do this through ensuring all locations remain branded by the Council and all staff within CSO have the same training and tools (including CRM and knowledgebase) to ensure they provide consistent responses and provision of information and advice.

## 2.4    EMAIL AND WEB INFORMATION REQUESTS: CS004

Through the implementation of our Customer Access Strategy, we will reduce customer email correspondence to a minimum, promoting self-service through on-line forms and aiming for high levels of resolution through the Processing Centre.

All contacts which are received into CSO by email and through the web will be **processed** (logged, resolved or passed to the back-office) **within 2 days**, with the aim of **resolving as many as possible without hand-off**. All contacts for which CSO are **responsible for providing a response** will be responded to **within 5 working days**, with any **holding responses resolved within the agreed timeframe**.

Where CSO is responsible for providing the responses, we will develop **well structured responses**, categorising and grouping as many as possible, aiming for consistency, using plain language, responding to all of the points raised. We will use Workflow to log, track and report on requests received from all channels, providing automation and tracking.

## 2.5    WEB TRANSACTIONS: CS005

Through the implementation of our Customer Access Strategy, we will increase the volume of successful on-line transactions, in particular for high volume services, by providing intelligent, transactional forms with progress trackers and in-context help, reducing the need for inbound telephone contact.

All transactions which are received into CSO through the web will be **processed** (logged, resolved or passed to the back-office) **within 2 days**, with the aim of resolving as many as possible without hand-off.

We will use Workflow to log, track and report on requests received from all channels, providing automation and tracking and will provide customers with an **on-line account** from which they can personalise the service they receive and track any requests or transactions, all with a single sign on.

We will explore with the Council, the adoption of **web chat** as an approach to ease transition for those customers who are not used to web self-serve, and to support others in handling more tailored queries. This will be assessed through a business case approach to ascertain the cost/benefit. This has already proven to be successful within our Child Maintenance 'Options' service.

Website Management is described in section 2.17.

## 2.6    POST AND FAX: CS006

Through the implementation of our Customer Access Strategy, we will reduce post and fax contacts to a minimum, promoting self-service on-line forms and aiming for resolution through the processing capabilities, with little need for hand-offs to the back office.

Customer Services will utilise our Corporate post facility in Darlington, in line with our broader proposition and as described in our Estates Method Statement. Darlington will act as a digital mailroom to receive, sort and scan mail and workflow activity to the appropriate teams and records will be retained electronically.

All contacts which are received into CSO by post and fax will be **processed** (scanned, logged, resolved or passed to the back-office) **within 2 days**, with the aim of **resolving as many as possible without hand-off**. All contacts for which CSO are **responsible for providing a response** will be responded to **within 5 working days**, with any **holding responses resolved within the agreed timeframe**.

Where CSO is responsible for providing the responses, we will develop **well structured responses**, categorising and grouping as many as possible, aiming for consistency, using plain language, responding to all of the points raised. We will use Workflow to log, track and report on requests received from all channels, providing automation and tracking.

Customer's postal correspondence with other service Partners **will be visible to staff within Customer Services**, through our agreed data-flows with Partners, showing the images through CRM.

## 2.7 ACTIVITY FULFILMENT: CS007

As described for CS001, we will comply with specific service standards and SLAs for the delivery activities in scope. Our approach to monitoring and reporting performance and quality across the CSO is described in Section 5.

We have vast experience in the transformation and operation of both public and private sector organisations and understand and will comply with all relevant **legislation** and **guidance,** using our knowledge of **best practice**.

For example, we will adhere to Data Protection Legislation, Accessibility, Freedom of Information Act and Transparency Requirements (such as Open Data). Also, Capita's Business Continuity Plans are aligned to Business Continuity Institute (BCI) Good Practice Guidelines and we will utilise Capita's proven experience of transferring operations to Customer Service organisations and Best Practice examples from other Partnerships.

From dialogue and site visits, we understand that the Council have a vision of a blend of the best from the public and private sector for the implementation of the CSO and our commitment to instilling this within the design is through our Client and Change Manager, who has been an integral part of the bid team and has experience of transforming and operational management for multi-channel Customer Service Organisations across the both sectors. The Customer Services organisation structure is described in more detail within Section 3.

## 2.8 SOCIAL MEDIA: CS008

Our experience shows that social media can be used as a channel to gain Insight from customers regarding service delivery as well as using as a real-time barometer of customer satisfaction and service delivery and to gain input into service design.

We will **abide by the Council's Customer Service Standards** and adopt the Council's strategy for Social Media in our use of social media and will **discuss and agree any new 'instance' with the Council's senior officer of Communications**.

All contacts received by Customer Services will be processed (logged, resolved or passed on to the back office) within two working days, with the aim of resolving as many as possible without hand-off. All contacts for which Customer Services is

responsible for providing a response will be responded to within five working days, with any holding responses resolved within the agreed timeframe. Well structured responses will be sent using plain language, responding to all of the points raised (where Customer Services has responsibility for providing the response).

Below are the areas we believe are opportunities to develop the use of Social Media, which we will discuss and develop with the Council's senior officer of Communications.

### Acknowledgement of the challenging environment

We recognise the wider potential for social media as a channel rather than concentrate on the fairly hostile environment that various blogging groups represent, and exploit more positive potential for engagement and co-production which the rest of the informal civic activity online might provide.

- **Informing** - Exploiting the low cost to communicate of sending messages out using social media channels as well as the advantage of connecting to people in a domain that is natural for them, be it Facebook, Twitter or other networks. Examples of this include; Rochdale MBCs use of Facebook in targeting low income families around Children Centres; creating a sense of immediacy during the 2011 Summer Riots where Birmingham City Council used a multi-channel business continuity approach using news feeds, social networking sites and linked to Birmingham's Business Continuity Partnership to provide up to date information online regarding safe travel routes in/out of the City

- **Consulting and engaging** - Informal discussions around topics areas to gauge initial feedback from residents. Examples of this include; Coventry boosted democratic engagement by using Facebook; Brighton and Hove used social media to increase civic participation during 2011 bad weather to mobilise help from 4x4 drivers to deliver meals on wheels and community transport for the vulnerable; Hillingdon built up civic pride by encouraging content contribution from local residents such as photos of local scenes to Flickr

- **Responding to enquiries** - Engaging with residents and responding directly to specific enquiries over social media channels such as Twitter and Facebook. This approach has the advantage of reducing the volume of direct face to face and direct call centre enquiries and can facilitate co-production of support among community

- **Monitoring and listening** - A considerable volume of activity over social networks takes place in the public domain and consequently can be mined as a source of information. It can also be used to understand the sentiment in local areas toward the council, appreciating hyper-local issues affecting

- **Analysis to find communities** - Through analytical approaches we will determine how many individuals are engaged with social media in Barnet, and to identify the communities they participate in

  During dialogue we shared research commissioned through Public-I, on how online communities can be identified through social media analysis. Through our service delivery we will continue with this approach, specifically undertaking a

periodic systematic audit of the online world associated with Barnet, identifying and classifying online activities

This community based analysis will be complemented with individual level analytical social media listening using the Insight Engine. This will show the volume of online participants which can be seen in Barnet, how they are geographically dispersed and through sentiment analysis, provide an insight into their feelings.

**The Insight team** will include a function that seeks -

▪ To engage with communities, monitoring specific platforms, answering online enquiries and adding comments and signposting users to relevant material, as agreed with the LBB Communications Team and in line with promoting self-service and co-production

▪ To amplify specific communities which are operating in line with the Council's vision, linking communities and signposting enquiries towards these communities as appropriate

▪ To build a mutually supportive relationship with the communities and directing messages to the communities that they may share with their user base

▪ To define the approach to be taken when speaking online of behalf of the Council.

## 2.9   ADVOCACY: CS009

It is an important part of our delivery model that the customer is at the heart of our operation, and so Customer Services will act as the **advocate for individual customers** in dealing with service partners.

Where a **delivery unit is unresponsive**, we will **escalate** this to the relevant client function.

We will act as the **advocate for individual customers** in dealing with service partners, ensuring level 0, 1 and 2 enquiries relating to specific service queries are responded to satisfactorily and any examples of **poor customer experiences are addressed by Service Partners**. This will be achieved in a number of ways, including monitoring of our Workflow queues, assessing where interactions are against their agreed SLAs, analysing any complaints and through our management of Partner contracts through our Procurement Team.

Through our Insight Engine, we will also **provide analysis of customer interactions** as a whole and **expertise in using this analysis** to develop understanding on future service development and failure demand elimination.

## 2.10   COMPLAINTS: CS010

A key element of our Customer Access Strategy is to encourage feedback from all customer groups.

Through our CRM system, we will manage **all level 1 and 2 corporate complaints** regarding the activity of the CSO in line with the Council's corporate complaints policy.

We will provide **the Council with all the necessary information required by the Council for stage 3 and LGO complaints**, in line with corporate complaints standards as well as all necessary information required by the Council or third parties for the management and processing of complaints at all levels (where the activity which is the subject of the complaint is not the responsibility of the CSO).

We will also refer **customers to the Statutory Complaints policy and procedure** for statutory complaints related to Adult Social Care and Health and Children's Services.

These procedures will built into our CRM scripts and CRM and Web forms, as well as being detailed within our knowledgebase.

## 2.11 WEB CONTENT: CS011

Our web solution is a critical part to our Customer Access Strategy and in the realisation of achieving channel shift and volume reduction.

We will work with the Council to implement an **improved framework for maintaining web content**. This will be made up of the following:

- A content maintenance process - with a set of guidelines and content principles and a **regular 2-way content change request process**

- Triggers for content reviews - ensuring all web content pertaining to the activity for which the CSO is responsible is **available** on the Council website and is **updated in a timely manner**, is relevant (where found to be irrelevant or inaccurate, our Service and Channel Development Team will **notify the content owner and Corporate Communications Team** in order for the content to be updated). Content may also be relevant and accurate, however, may not be as effective as it could be, so we will work with the content owners on how this can be redesigned/re-purposed

- Service and Channel Development Team, including content subject matter experts

- A Content Management System with training for remote editors.

In response to SOCITM's Better Connected strategy, which will **measure Council website performance** in a number of ways, including the use of GovMetric surveys, basing the design around the Top Tasks and assessing their use. We will adopt key task analysis to audit the current site and rationalise web content, drawing on the practical experience we have with working with Gerry McGovern (the originator of the Top Task method) where we successfully adopted this approach at NHS Choices.

As part of the Customer Access Strategy, the Service and Channel Development Team will take a multi-channel view of customer interactions, as well as using information from 'Root Cause Analysis' and Insight, to ascertain what information should be included and how best to deliver this across the channels. This will include cross-promotion within the channels.

## 2.12   ACCESS TO DATA: CS012

We will provide **all information to deliver performance information** as required for the measurement of performance indicators. Section 5 describes our approach to performance management, reporting and quality assurance in detail.

We will introduce **methods for monitoring customer experience of other partners delivering Council services** and **establish relevant contractual relationships** with those partners, by providing access to data and insight into the customer experience through:

- Analysis of Lagan CRM data in relation to performance of the Council or Delivery Partners in responding to the service requests/cases passed on to them for action. Linking to requirement CS009, we will act as the advocate for individual customers in dealing with service partners, ensuring satisfactory performance

- Analysis of customer compliments and complaints received in the CSO, for CSO and  non CSO service related activities

- Customer satisfaction surveys

- Social media monitoring

- Co-design activities with customers to gain qualitative data in relation to their experience of services.

Where our procurement service are working with delivery units and commissioners to let new contracts for services to citizens, we will work with them to review performance/customer satisfaction of prior service as part of co-design of specifications and incorporate their requirements for performance data into new contracts.

This will include establishing **joint working groups**, bringing the expertise of our own partners such as the **Advisory Panel**, establish **contracts of engagement with services and partners**, agree and **monitor service level agreements** and performance for escalation and workflow.

We will also deliver **appropriate levels of integration and access** to systems including our single customer view based on service interactions and the Council's chosen corporate address database (currently NLPG/LLPG) for CSO services.

This will also include the provision of **insight on customer experience and behaviour** as the Council requires for commissioning services and monitoring contracts. As the Managing Agent service becomes live and embedded in the Council's operating model, we will develop rich data regarding performance of the delivery units and their contribution to the Council's strategic outcomes.

Services and partners will be continually engaged throughout the design and implementation of the new solution and during business as usual.

We will agree with the Council the approach for the provision of **scheduled updates**, **access to systems**, as well as **ad hoc data** in a format and at a frequency that easily allows further analysis by the Council's retained intelligence functions (to be defined by the Council's Information Management Strategy/ data flow agreements).

Services and partners will be continually engaged throughout the design and implementation of the new solution and during business as usual.

Through our Insight Team working closely with the Council's Insight capability, we shall make reasonable endeavours to **engage in projects and practitioner networks** facilitated by the Council.

In addition to this and as requested within the Output Specification, we will work with the Council to make reasonable endeavours to **supply management information** to the Council as required, through our MI team, which will be discussed as part of the standing agenda for the regular meetings with services.

## 2.13  SERVICE LEVEL AGREEMENTS: CS013

Our main aim during Transition and Transformation is to maintain service levels and we will resource our channels according to the agreed forecasted volumes, average handling times and performance standards, therefore, **abiding by agreed service levels**.

This process will continue as part of the Business as Usual operation and we will therefore abide by all service level agreements between the CSO and Council services and partners.

As detailed above for CS012, we will have a process in place for regular review and discussion with partners regarding their performance with regards to customer experience.

As detailed in section 3.3, we will engage with services on a regular basis to cover a number of standing agenda items. These will include:

- Performance review (SLAs, volumes, AHTs, etc)

- Future forecasts - volumes and calendar of service events which affect volumes/call types

- Change - planned and change requests

- Progress of transition and transformation (whilst underway)

- Customer Insight - view of data from customer interactions. Proposals for improvements/changes to service design

- Channel shift and volume reduction activity - activity underway within service and NSCSO.

Any perceived issues with performance against the SLAs will be raised at these engagement sessions for discussion and investigation, with any further escalation to the Operations Board (see Schedule 12 for more detail). Any large scale variance outside of agreed forecasted parameters will be raised immediately with the service area. This will be to ascertain the cause for the variance, how long it is likely to continue and to agree actions for improvement.

## 2.14   PERFORMANCE MANAGEMENT: CS014

The performance of the CSO will be monitored by the Council **in accordance with the targets agreed and articulated within a balanced score card**. The scorecard will include a combination of strategic and operational measures and will therefore be useful for the running of operational services, as well as strategically for reviews of channels and services.

Using our Insight Engine, we will have a raft of information which will be analysed by our Insight Team. Our Service and Channel Development Team will hold **contract management meetings** (Schedule 12 describes our Operations Board and Governance Process in more detail) with service areas to discuss areas of interest and agree where changes to business rules in scripts, as well as knowledge and web content, can be made to improve the performance and customer experience and overall performance reviews.

Within our CSO, we will have in place appropriate **procedures and controls** for maintaining and storing documents, materials and records relating to the service and these will be used during our regular engagement sessions (contract management meetings) with the Retained Client service areas, as described in section 3.3 and above in CS013.

An agreed representative will **attend Cabinet and Scrutiny Committee meetings** as requested by the Council, at least on a quarterly basis, to present performance information to Members and to highlight areas of continuous improvement. We have significant experience across our other local government partnerships of attending these forums and further, will take guidance from the Council as to the approach required during these engagement sessions, including any pre-briefing that may be necessary.

We will also **support** the needs of the Council as regards to **independent audits and inspections**, whether completed by the Council's own audit responsibilities or through independent inspection processes This is likely to include provision of information, as well as site visits to CSO locations.

## 2.15   BRAND: CS015

We will ensure that **all interactions with the CSO are seen by customers as interactions with the Council**. We will do this through Council branding in face-to-face facilities, consistent knowledge and scripting and instilling a culture of representing the Council and serving the residents of Barnet.

Our Service and Channel Development Team will be responsible for consistent content across our scripts and maintaining the Knowledge Base, ensuring it is fully representative of Council policy.

Across all channels we will provide a consistent approach to training and performance management. This will instil and reinforce the 'Barnet' branding in the culture of the Customer Services Organisation. Our agents will feel that they are representing the London Borough of Barnet and that their customers are the citizens of Barnet.

We have a successful track record of achieving this culture throughout our existing operations. The culture is achieved through the recruitment of staff to match the

'branding' of the client and the customer base, training and performance management and reinforced further with the branding of the facility. For example, in our retail Contact Centres in Dearne Valley, where we serve many different clients, each team has a clear client identity which comes through in the quality of interactions with their customers.

## 2.16  DEMOCRATIC ENGAGEMENT: CS016

We will provide **ward level business intelligence information** to ward Members to support then in their role as community leaders. Business intelligence reporting will be delivered in a number of ways - for the Council as a whole, by directorate, by service, by partner, by channel, by individual interaction type and down to individual front-line advisor. This is further described in our Performance Management Section 5.1.

We will provide a **specific channel for Member enquiries and corporate complaints**, continuing with the existing Members telephone line, whilst promoting self-service for Members to use a dashboard of information provided through their staff portal. We will engage Members in the co-design of this dashboard, which will have specific information for their ward and service portfolio, for example, by service activity, service request information split out by interaction type and by ward location.

All Members interactions with the CSO will be captured within CRM, enabling progress to be tracked and **ensuring members' enquiries and complaints are responded to within 10 working days**.

## 2.17  WEBSITE MANAGEMENT: CS017

As detailed in CS011, our Web solution is a critical element of our Customer Access Strategy and will be **designed to enable customers to self-service.**

Our Service and Channel Development Team have the responsibility of ensuring that all the required **Technical Tasks** as described in the Website Transformation Project Business as Usual Task Definition document are completed.  We will work with the Council's Communications team and, where appropriate, retained Council Delivery Units and Delivery Partners, to ensure and agree adaptation to the website and content is managed in accordance with the Task Definition document.

They will agree **Management Tasks** upfront with LBB and all of these will be completed as and when required to maintain the effective running of the Council website in line with the Council's expectations, with all other tasks being completed **in line with the SLAs** as outlined in the Council's Website Transformation Project - Development and Business as Usual Task Definition document.

Our Channel Development Team will also be responsible for working with the Council to develop web governance and online content principles and ensuring adherence to these across the Council, as well as within the CSO.

## 2.18  KNOWLEDGE MANAGEMENT: CS018

Knowledge Management is a critical element of our Customer Access Strategy and a key tool to enable customers to self-serve and self-help, as well as support our staff and to enable them to resolve enquiries at the first contact.

As described in Section 4, our Knowledgebase solution Transversal, will provide intelligent, contextual knowledge provision to all customer groups, supporting resolution and channel shift.

The knowledge solution will capture common information and develop contextual data relationships between information systems (e.g. CRM and Back-Office systems). It will manage information from various input sources such as the intranet, internet, Document Management repository and specifically submitted content.

The knowledge management repository will also include collateral (referred to as 'articles') such as FAQs, user guides, procedure manuals, e-forms, website pages and any other articles identified as suitable to assisting the contact centre in delivering a seamless "once and done" service.

Knowledge will be maintained by the Service and Channel Development Team, ensuring that **all content pertaining to the CSO is available to customer facing staff and is updated in a timely manner**. They will analyse the use of the knowledge, utilising the 'rating' responses to identify where **the Council's service input into the knowledge management content** is no longer relevant, out of date or inaccurate and take action to notify the content owner so the content can be updated. This will be linked closely to the approach for the web content, joining these where appropriate.

## 2.19   SERVICE TRANSITION: CS019

Section 6 describes our implementation approach. A crucial part to our solution and our approach to reducing risk during implementation and the transfer of services is having key personnel in place during Transition and Transformation who will continue through into Business as Usual.

The Service and Channel Development Team are an example of this and staff will be in place during to support implementation, during co-design, configuring the Lagan CRM and Transversal Knowledgebase and as part of Business as Usual to maintain knowledge and establish continuous improvements.

As described in more details within the Transition Method Statement, during transition, we will maintain both Formal and Tacit Knowledge:

- **Formal Knowledge** covers all relevant written and electronic procedures, guides and databases relating to services

- **Tacit Knowledge** includes information known by members of staff and retained in their heads. Whilst this is manageable during normal business, its weakness can be quickly exposed when individuals are lost to the business. We therefore place high importance on the capture of tacit knowledge, especially prior to significant change taking place in a business.

We will also utilise additional experienced transformation resource who will manage the Customer Services stream within our Transition and Transformation Programme, understanding for the service any required knowledge transfer from the Transformation team.

We have provided a **fully risk assessed implementation** plan for the transfer of services which is detailed within Transition Method Statement.

## 2.20   CHANGE CONTROL: CS020

We will adhere to an a**greed change control process for any alterations made to service, systems or process changes.**

For all proposed changes **an agreed level of notice and full impact assessment of the change** being proposed will be submitted. The assessments will include the impact on CSO, retained/back office services and partners. Schedule 14 describes this in detail.

### Phase 2 - Customer Services

We are committed to establishing a comprehensive transformation of Customer Services, which has been described through this method statement. However we also recognise that this is a 10 year partnership and over that term we will see significant change, in particular as the Council move towards its new role as a Commissioner and as it faces continued financial challenges from reduced Government funding. We will also be informed by vast amounts of Insight data, which will help to highlight opportunities and areas of continuous improvement.

As a result, we recognise the need to seek continued transformation opportunities and plan to do this through a Phase 2 programme for Customer Services.

**Extension of scope -** The Phase 2 programme will leverage the core solution to deliver wider improvements and benefits, by deepening existing services within Customer Services and widening the scope of services.

Activities will include:

- The transfer of other customer services activity currently embedded in Council service delivery units into our consolidated Customer Service Organisation

- Applying the customer contact solution to deliver improved consistency of customer contact

- Freeing up frontline service professionals from basic administration activities

- Providing easier access to customer information such as case notes

- Improvements to the availability of management information.

**Demand Management** - We will also apply the core customer contact capabilities to reduce demand for retained side council services by, for example:

- Providing better and more systematic diagnosis of Council customer issues, thereby reducing inappropriate deployment of front line resources and subsequent rework

- Reducing missed appointments through more effective management of Council's customer interaction

- Implementing a more robust gatekeeper function that supports the application of Council customer's eligibility criteria and identifies alternative support options for Council customers.

### Revenue Opportunities

- Providing Customer Services to delivery partners and other public sector agencies in the wider Barnet EcoSystem on a traded basis, proving a seamless customer experience

- Offering the sale of services to people who don't quality to receive services 'free of charge' from the Council, for example, elements of Adult Social Care

- Offering the sale of services which are optional to Customers (Citizens and Businesses) beyond what is funded by the Council, for example Build and Design services

- Campaigns, such as the marketing of local events which are relevant to a customer interaction or life event

- Expanding into sales of products and services which are not normally available through the Council, such as Utilities and household products.

Examples of typical Phase 2 Customer Service activities or business cases developed for some of our other clients include:

- Birmingham City Council - By transferring all calls from over 30 Neighbourhood Offices to a corporate Contact Centre, over 50% of contacts are resolved at the first point of contact, reducing the demand of front-line face to face service delivery

- Harrow Council - through implementing web self-service, have seen a 30% reduction in calls to the Contact Centre regarding outstanding Council Tax payments

- Edinburgh City Council - Business case to incorporate Housing Repairs within a Customer Services organisation, reduced:

  - The average cost of a Housing Repair by around £30

  - The volume of Housing Repairs by 10%

  - The volume of Out of Hours Housing Repairs by 20% and

  - Associated Housing Management costs by 10%.

A key source of highlighting opportunities for extending existing services, expanding new services and informing services design within the CSO is the use of Insight. Our Service and Channel Development Team will analyse data from the Insight Engine, as well as from the 'root cause analysis' we will conduct as part of general service and channel performance reviews and discuss opportunities for improvements with service areas.

Opportunities for savings in addition to our core offer may be indentified through the potential Managing Agent function and these will be assessed through a Strategic Business Case process in accordance with Schedule 15 Special Projects, contributing to the Managing Agent savings.

# 3    STAFF

## 3.1    CONSOLIDATED CUSTOMER SERVICE ORGANISATION

Our customer services organisation will be a consolidated, multi-channel, multi-service operation, which we know from experience is a critical part to the success of driving through the improvements, changes in behaviour and efficiencies.
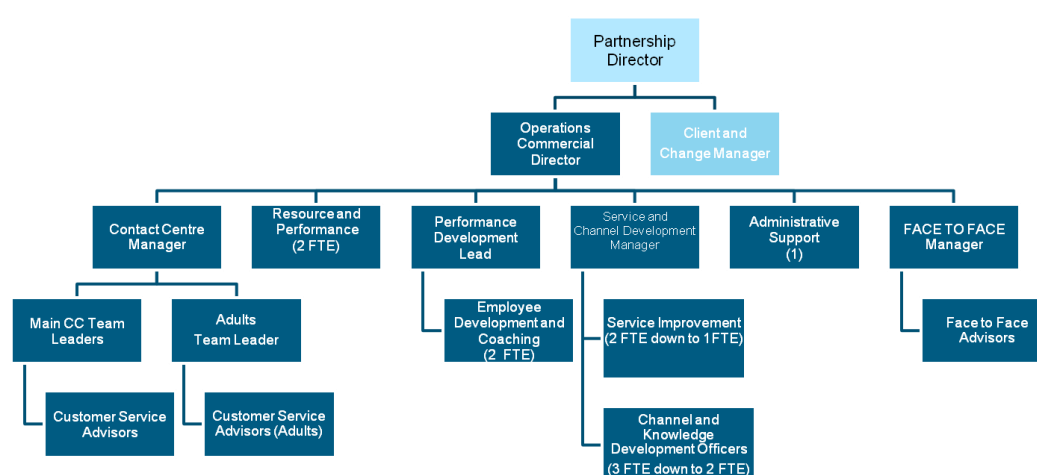
The chart below highlights the structure from month seven.



**Figure 27 - CSO structure from month seven**

Our structure is based around a **Partnership Director** who will be responsible for the delivery of the savings and improvements across all channels and services in scope for customer services. This structure reflects the experience we have gained from our numerous local government and public sector operations.

Supporting our Contact Centre and Face to Face teams will be the **Service and Channel Development Team,** who (as detailed in section 1.7.2), will work closely with our Insight team, to shape the design of our channels and services, thus enabling the Customer Access  Strategy in the medium term, and continuous improvement and innovation in the longer term.

The **Client and Change Manager** has worked as part of the Bid team and will bring private and public sector transformational and operational experience to will ensure the best from both sectors are embedded and maintained into our solution.

Another crucial part to our solution is having **key personnel in place during transition and transformation** who will continue through into business as usual. The Service and Channel Development Team are an example of this and staff will be in place during to support implementation, during co-design, configuring the Lagan

CRM and Transversal Knowledgebase and as part of business as usual to maintain knowledge, and establish continuous improvements.

**ASCH staff** - Registered Social Workers are currently included in the future operating model. We are happy for the transfer of the Social Workers under TUPE.

We will use our Social Worker resourcing business to provide ongoing training, verify registration and monitor professional development practice. We will also work with the Council's ASCH team to ensure our Social Workers are up to date on local policies and procedures.

On duty registered social workers will be responsible for monitoring and reporting any interactions of a safeguarding nature and involved in the training of Customer Services staff in identifying the characteristics of a safeguarding case. We are committed to the ongoing learning and professional development of all staff and we will ensure that changes in Council and national policy are reflected in this training and the interactions with customers. Our ASCH Contact Centre staff will be trained specifically in software and processes specific to ASCH, including the use of the new social care case management solution outlined in the ASCH Investing in IT submission.

**Skilled and informed Customer Service Professionals** – we will invest in front-line staff, offering all the opportunity to become accredited through the Institute of Customer Service (ICS). We will also provide tools and training to staff, enabling them to be advocates of the Customer, increasing resolution, customer satisfaction and promoting self-service.

LBB raised to us in dialogue that there may be **opportunities to commence employment of key Customer Service personnel at Preferred Bidder stage** and we would welcome further discussion regarding this.

We will ensure that our employees have the **necessary skills and competencies** to achieve their objectives, be successful in their roles and progress in their careers. These will directly reflect the cultural values of the Council and the Partnership.

People are at the core of our business and our success. We have a comprehensive and fully integrated, **competency-based performance management framework** that focuses on ensuring all employees have the skills and knowledge they need to do their jobs to the best of their ability.

This is underpinned by a comprehensive workforce development approach that makes available learning and training to meet both generic and service-specific development needs. It is focused on ensuring the right balance and delivery method for:

- Organisational Development
- Recruitment and Retention

- Leadership Development (from team leaders to senior managers)
- Talent Management

- Skills Development
- Pay and Rewards.

We will provide:

- On-the-job training, including training on the core service application, IT systems and customer service soft skills

- Capita Academy for core skills training

- Legislative training, regarding assessment and policy

- Accredited learning, such as the Institute of Customer Service (ICS). We have experience of supporting over 2000 people through the Institute for Customer Services within Birmingham City Council

- Engagement with Capita peer group community and opportunities for secondment and/or engagement on special projects

- Management Academy, delivering effective management, coaching and support to encourage staff and team development

- Opportunities for staff to participate in co-design, to help remove obstacles to delivering great service, and by engaging them, reduce any frustration or sense of disempowerment.

## 3.2 LOCATION

An important element to our solution is that customer services is a multi-channel, multi-service operation, with responsibility for all of customer services reporting to one manager. This will enable an end to end view of the channels and services, as well as responsibility for achievement of channel shift efficiencies and targets.

The contact centre will be managed from our Darwen site, which provides contact centre operations for BBC TV licensing, making use of a scalable, expanding and established infrastructure. Our Darwen contact centre has adopted a customer focused and Insight driven strategy which, matched with our experience of running local government operations available nearby, will provide solution and service specific expertise.

We have discussed in dialogue the location of Adult Social Care and have decided that this should remain in Barnet in the first instance and we will evaluate the benefits of moving this service to Darwen, through discussion with the service area.

Face to Face services will initially remain being delivered through the existing locations of Burnt Oak Library, Barnet House and NLBP. We will work with the Council, our partners and our Estates Team to confirm future locations.

Our Estates Team's overall property proposals include the implementation of an Agile workplace programme across the Council during 2013/2014 to identify and enable people to work more flexibly and from the best location suited to the task being performed. This will allow us to reduce the demand on property across the Borough and, in turn, exit NLBP 4 in 2015. People exiting NLBP 4 will be relocated in

Barnet House and have the ability to work from outlying Council assets as and when the need arises. This will be linked to our Customer Access Strategy.

In 2020 we will exit NLBP 2 and move to other office accommodation within the Borough. Our reception responsibilities will be reviewed prior to this.

Our Estates Team's plans can only be finalised and approved following the completion of our 2014 engagement programme with end users and providers to ensure the property estate reflects the future service requirements of the Council and citizens of Barnet. Our staff will have the technology to enable them to work in any of the Council's facilities, or at home, in line with the Agile Workplace Programme.

## 3.3 RETAINED CLIENT, SUPPORT AND ENGAGEMENT

It is hugely important that service areas are involved and engaged in transition and transformation activities, as well as being part of the business as usual operation.

As already stated, co-design with staff and customers is crucial and will continue throughout the partnership as we gather information through our Insight Engine.

During transition, services will be required to advise customer services regarding the business rules for entering into aspects of our solution, such CRM and the knowledgebase, as well as providing content for the knowledge base and web. They will also be required to provide main directories of suppliers for their service which will be used for signposting.

As part of the business as usual operation, our Insight Engine will gather data, which will be used to inform future service and channel delivery. This will be analysed by the Insight Team, who will discuss areas of interest with the Service and Channel Development Team and the service area themselves, in order to agree changes to business rules in scripts, as well as knowledge and web content.

As described for CS013, Service Level Agreements, we will engage with services on a regular basis to cover a number of standing agenda items. These will include -

- Performance review (SLAs, volumes, AHTs, etc)

- Future forecasts - volumes and calendar of service events which affect volumes/call types

- Change - planned and change requests

- Progress of Transition and Transformation (whilst underway)

- Customer Insight - view of data from customer interactions. Proposals for improvements/changes to service design

- Channel Shift and Volume Reduction activity - activity underway within service and NSCSO.

## 4 SUPPORTING TECHNOLOGY

The Customer Access Strategy will deliver a choice of service channels, enabled by technology.

The diagram overleaf describes the technology enablers at each layer of our service delivery model.
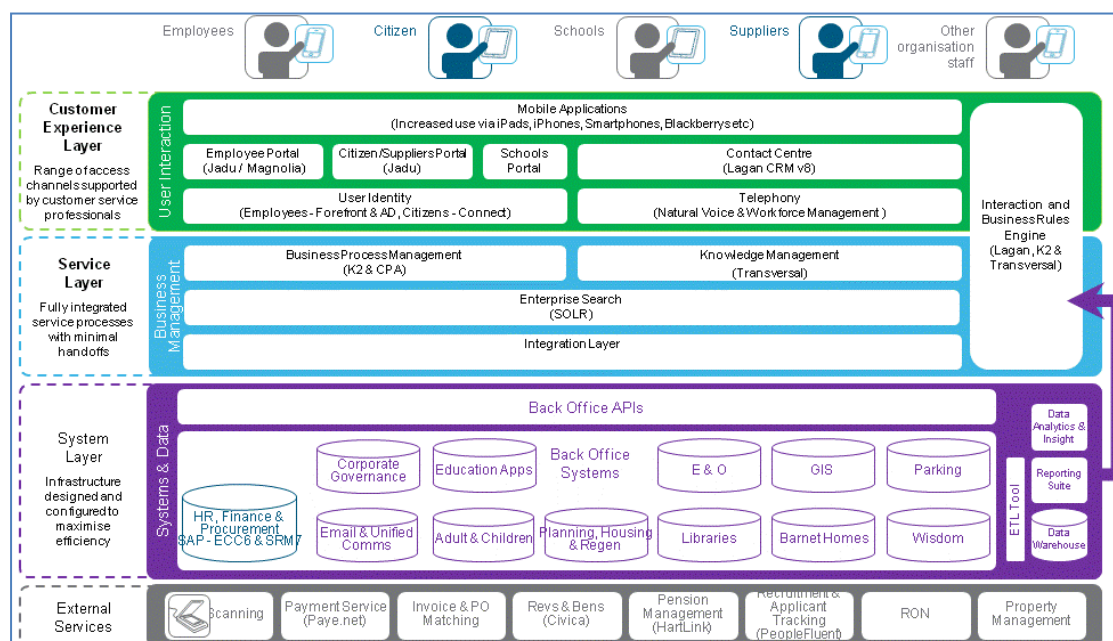


**Figure 28 - Technology platform**

Underpinning solution components for customer services include deployment of a number of enabling tools through the customer experience layer, described below, which will be supported by our customer service professionals.

## 4.1 TELEPHONY

**Improved Telephony** – through the deployment of a number of tools, we will improve resilience through being able to link to our network of other sites during times of unprecedented demand. Using automated IVR, workforce management, quality and performance management we will flex and manage our staff to ensure we get the best from them and they are empowered. Where a transfer of a request through workflow/CRM is not appropriate, we will use 'warm-transfer' for hand-offs to service areas.

**Natural language** - calls will be routed to individuals or teams, based upon established business rules.

**SMS** - we will enable inbound and outbound text, deploying these proactively where it will improve customer experience and reduce future, avoidable contact.

**Simple mobile phone apps** – to enable customers and staff to access information and provide information. We will utilise our exclusive collaborative insight partnership between Capita and O2 (Telefónica UK Limited) to explore capabilities and service provision opportunities using the latest mobile applications and technologies. Self-Help.

**Improved web capability** – building upon the work already undertaken to rationalise and improve content and to enable self-service of tasks and changes in life stage, we

will be implementing a new technology platform to create more intuitive, automated and accessible web services. This technology solution is covered in more detail in the overarching transformation method statement but will include.

- **Content management** - creating better structured information and information links

- **Web analytics** - for more intuitive responses to information requests and data matching

- **Federated search** - Federated search (Solr), enabling searches for information across LBB and partner websites across the EcoSystem

- **Forms engine** - Deployment of intelligent, transactional web forms, enabling self-service and capture of structured information.

## 4.2 CORE CUSTOMER EXPERIENCE LAYER ELEMENTS

**Insight** – real time information provided during customer interactions, enabling linkages across services through 'Life events' and tailoring to customer groups, as well as static data for reporting, management information and tailoring campaigns.

**Multi-channel strategy** – further developing our customer/channel/service matrix, promoting channel shift and enabling demand management.

**Portals** – providing access routes for staff, customers, suppliers, Members (through staff portal), with relevant information in one place. Enabling self-service and self-help, presenting users with information and options.

**Developing and enhancing the Council's portal strategy** to establish new portals:

- **Citizen Portal** - We will deliver an improved, flexible and resilient Internet platform, with a range of content and transactions, sourced from within the council and wider Barnet EcoSystem, to enable and maximise channel shift. This will be through transactional forms, information and advice through the intelligent search engine, signposting, personalised 'My Account'

- **Schools Portal** - This will provide schools with a complete catalogue of services they can buy and allow their staff to self-serve to make key interactions, especially in HR and Payroll, much easier

- There will also be an **Employee Portal** – which members of Customer Service will use and will become the place where employees "go to work", whether they're sat in the office, out on the road or working at home. We will create a feature-rich and engaging user interface (UI), which employees will see as an invaluable tool which they use on a daily basis. As with the other portals, co-design will be used to design the functionality, but our initial conceptual view of this "Internal" view of the Customer is shown overleaf:
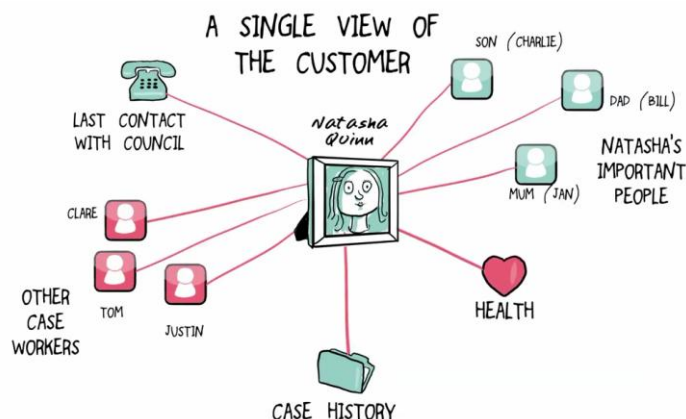
**Figure 29 - Single customer view**

The Employee Portal will help employees and Managers to get their job done, as well as making them feel part of the Council's employee community. **Members** will be able to view a dashboard of information regarding their respective Ward and service portfolio

▪ **Supplier Portal** - This will provide access to a range of services to Council suppliers such as access to eTendering, and for registered suppliers secure access to check payment progress against their invoices.

**Customer Relationship Management system** (CRM - Lagan V8) – improved system for managing customer contacts across all channels (phone, web and face to face), used as the central point for customer contact, displaying the single view of the customer, Insight information and tools for the advisors which will include knowledge bases and simple script guidance.

**Deepening resolution** of enquiry - enabled through consolidation and deployment of consistent, best practice processes and through tools such as the CRM and knowledge bases, customers and staff will be able to make decisions regarding enquiries without needing to speak with a back-office service representative, supporting the driver for demand management in the back office.

**Tracking of service requests** - for all in scope services, through all channels, our solution will enable full visibility and accountability of service provision.

**Proactive contact** – through intelligent notification to customers, in the form of SMS and email reminders and service updates and through the use of Insight data to provide proactive contact such as campaigns for recycling.

**Social media** – used as a channel to encourage engagement across all customer groups to help shape service design and gain feedback on service delivery.

**Single customer and property view** – viewable across all in-scope services, based on service and channel interactions and used to inform customer interactions.

**Signposting across the EcoSystem** – Our technology platform will enable us to signpost across the suppliers of service throughout the EcoSystem, as outlined above in section 1.7.3 strengthened by robust governance. Section 4 highlights how

technology will enable us to share data and information in order to provide customers with the most appropriate information and signposting.

## 4.3 SERVICE LAYER

**Work-flow** – enabling automation and tracking of service requests for customer interactions for in scope services. We will minimise hand-offs between Customer Services, the processing engine and subject matter experts through the use of workflow and the knowledge bases.

**Knowledgebase (Transversal)** – intelligent, contextual knowledge provision to all customer groups, supporting resolution and channel shift. We will implement a knowledge management solution to capture common information and develop contextual data relationships between information systems (e.g. CRM and Back-Office systems). It will manage information from various input sources such as the intranet, internet, document management repository and specifically submitted content. The knowledge management repository will also include collateral (referred to as 'articles') such as FAQs, User Guides, Procedure Manuals, E-forms, Website pages and any other articles identified as suitable to assisting the Contact Centre in delivering a seamless 'once and done' Service.

We will implement knowledge bases for internal and external customers, providing accurate, contextual responses to queries increasing first time resolution and direct links to support self-service.

# 5 PERFORMANCE MANAGEMENT, REPORTING AND QUALITY ASSURANCE

## 5.1 PERFORMANCE MANAGEMENT

As per our response to CS014, the performance of the CSO will be monitored by the Council in accordance with the targets agreed and articulated within a balanced score card. The scorecard will include a combination of strategic and operational measures and will therefore be useful for the running of operational services, as well as strategically for reviews of channels and services.

Using our Insight Engine, we will have a raft of information which will be analysed by our Insight Team. Our Service and Channel Development Team will hold contract management meetings (Schedule 12 describes our Operations Board and Governance Process in more detail) with service areas to discuss areas of interest and agree where changes to business rules in scripts, as well as knowledge and web content can be made to improve the performance, customer experience and overall performance reviews.

Within our CSO, we will have in place appropriate procedures and controls for maintaining and storing documents, materials and records relating to the service and these will be used during our regular engagement sessions (contract management meetings) with the Retained Client service areas, as described in section 3.3 and above in 2.13.

An agreed representative from CSO will **attend Cabinet and Scrutiny Committee meetings** as requested by the Council, at least on a quarterly basis, to present performance information to Members and to highlight areas of continuous

improvement. We have significant experience across our other local government partnerships of attending these forums will take guidance from the Council as to the approach required during these engagement sessions, including any pre-briefing that may be necessary.

We will also support the needs of the Council with regard to independent audits and inspections, whether completed by the Council's own audit responsibilities or through independent inspection processes This is likely to include provision of information, as well as site visits to CSO locations.

We will adopt numerous key operational working practices to support the achievement of Council KPIs and PIs. These include:

| KEY OPERATIONAL PRACTICES |
|---|
| Providing knowledgeable and **skilled Customer Service Professionals** who will represent the Council and its brand in the most positive way. We have the latest workforce and process management tools, in resource planning and real-time management. We will use a competency model to select staff and managers so that the attitude, behaviours and skills of potential employees are verified prior to appointment. |
| **Managers who are focused** on client business objectives with the previous day's performance being a key focus for all levels of management and discussed daily with their respective team along with the focus for the day ahead. |
| **Coaching & development** – A significant proportion our team leaders' time will be dedicated to coaching and developing their team members. Coaching methods we will use will include remote call monitoring, side-by-side call monitoring, performance appraisal and ongoing and regular feedback for the Contact Centre and scenario testing for Face to Face. Employee development coaches will provide expertise and intensive one to one coaching and support where required. |
| **MI Reports** that are relevant, accurate and timely from the management information team to support performance improvement. |
| **Our Resource Management Team-** will check that staff availability and performance match the required resourcing plans for all channels. They will manage work queues and ensure that staff resource and skill-sets meet demand in the most cost-effective way. |

We will manage and improve individual and team performance at all levels throughout Customer Services. This is a vehicle to drive individual performance, which in turn drives team and business performance and will ensure we achieve the overall Council and Capita objectives - as these will be linked to the joint priorities of the Council and Capita.

Managers and Team Leaders will have their performance reviewed against set objectives and behaviours which link directly to Council goals.

We measure Manager and Team Leader performance in two main areas; 'objectives' and 'behaviours'- both of which will in influence their overall performance rating at the end of each year.

- Objectives are the 'what' element. It's about an individual's output and the results they achieve and influences their overall performance rating at the end of the year

- Behaviours are the 'how' element. Essentially an individual's achievement in line with the Capita and Council Values.

## 5.2   REPORTING

We will produce clearly defined system generated reports allowing for ease of production and, importantly, ease of interpretation.

Through the implementation of the new corporate customer service organisation, we will enable improved information flows between departments, as well as between day-to-day operational teams and strategic management decisions.

We will deliver a new corporate reporting suite (Schedule 13 outlines our approach to monitoring) with management and performance information reported against required KPIs, PIs, corporate/service area objectives, etc.

Reporting will be delivered in a number of ways - for the Council as a whole, by Directorate, by service, by partner, by channel, by individual interaction type and down to individual front-line advisor. We will also provide ward level information to ward Members to support them in their role as community leaders.

Provision of powerful MI and Customer Insight (as referred to in section 1.7.1) in a consistent and agreed manner will raise the visibility of performance at all levels, as well as accountability for the delivery of services, etc. We will achieve this by:

- Working closely with all levels throughout the organisation and with partners, we will agree reporting metrics and formats within a standard suite

- Holding regular relationship management sessions with each stakeholder group to review performance, discuss any issues or areas of improvement, as well as tracking benefit realisation as per the agreed plan

- Ensuring each stakeholder group has the most appropriate view of their data, whether individual advisor information for the operational teams, or trend analysis and Customer Insight for strategic management decisions.

The capturing of high quality information at the front-line through our consolidated front-office will enable us to provide consistent information and the sharing and visibility of this information will enable operational teams to analyse their specific areas of responsibility and see where their activities link to and impact others, enabling a 'whole systems approach'.

Regular forums will be held where performance information is discussed to ensure stakeholders, in particular Members, are clear on actual performance and any reasons for potential changes to demand/performance, to ensure 'one version of the truth' regarding performance. Our Governance approach is described in more detail in Schedule 12.

We will provide data in a format that easily allows further analysis by the Council.

## 5.2.1 CUSTOMER SATISFACTION

Customer Satisfaction is one of the two KPIs for Customer Service and a crucial part of our solution. We understand that high levels of customer satisfaction are important to effective service delivery and our approach is based on the use of Insight and our experience of successful delivery of over 200 million transactions annually.

Our approach to customer satisfaction covers all channels and includes how we measure customer experience and satisfaction and how we will increase customer satisfaction levels. We will measure customer satisfaction in a number of ways, including by access channel, by service, by customer profile and for the services overall. Tools such as Govmetric will continue to be used.

Measurement methodologies include - Using Insight; utilising existing forums; developing further our advisory panel regularly repeating surveys; leveraging the knowledge of partners; assessing against the six equalities questions; providing dashboards; using tools such as Govmetric and using social media.

To increase customer satisfaction levels, we commit to a broad programme of customer service transformation, with activities covering customers, transferring staff/managers, Council staff, Council senior management and Members, and delivery partners.

These activities include:

- Using Insight to understand needs

- Creating access channels appropriate to need

- Customer/staff engagement in design through to implementation

- Managing service quality across all providers

- A programme of continuous improvement based on Insight to improve service and integration

- Management of customer expectations through proactive service updates.

We will provide Insight on customer experience and behaviour as the Council requires for commissioning services and monitoring contracts.

## 5.3 QUALITY ASSURANCE

Fundamental to the delivery of our customer service solution will be the quality of information on which decisions are made. We will ensure that the underlying data is accurate, a critical component to the provision of advice at any level.

We will implement an overall approach to quality management to govern performance and service delivery across the EcoSystem.

Staff will be trained to interact with customers by matching their response through their verbal and written communication, appropriately to the quality standards of the Council and in the most appropriate way for the customer group.

As we transition services, we will maintain and improve quality performance through the Capita approach to quality assurance, which encompasses the end-to-end process (not just what happened on a call). This means factors such as recruitment, induction, training, environment, management practices and technology will all play a part in how the service is delivered to the customer and are all 'in-scope' as far as quality assurance is concerned.

Our quality assurance process consists of the following key stages:

- Define the requirements for the service, based on Council and/ or citizen requirements

- Measure the current service against these requirements (this includes call monitoring, but also include capturing feedback from frontline staff and external customers)

- Identify gaps between the service being delivered and the requirements

- Carry out root cause analysis to identify what is causing the service to fall short of the requirements

- Fix problems, mistake proof processes and make improvements (aligned to closing the identified gaps)

- Re-define the requirements for the service if necessary.

For all services, our reporting suite and Insight will provide us with valuable information across the EcoSystem, of the quality of service delivered.

This will be enabled through our Insight Engine, workflow management and the governance across the EcoSystem and will focus upon the process, the customer and the customer service professional involved.

Speaking with dissatisfied customers is also an opportunity to carry out root cause analysis and probe to identify exactly what went wrong in the first place. To get the most out of this opportunity and to ensure that 'detractors' can be converted to 'promoters', our customer service professionals who re-contact dissatisfied customers will be provided with the right training, skills and empowerment to resolve issues and investigate root causes.

To ensure consistent quality, we will also provide training to the team leaders on standards and the agreed monitoring process, ensuring that they are signed off before conducting checks on their teams. We will also conduct "check the checker" activity to ensure consistent and accurate assessments are conducted.

The quality assurance system will be backed up by established standards that are included in induction training and reinforced by refresher coaching throughout the employee lifecycle.

# 6    IMPLEMENTATION

## 6.1    MODELLING ASSUMPTIONS AND APPROACH TO VOLUMES, PERFORMANCE AND AHT.

As highlighted in Section 1.4, in preparing our model we have taken on board the Council's assumption, in relation to the remaining query (regarding the variance in the baseline contact volumes and the transferring budget and whether these volumes can be accommodated within the transferring staff and budget baseline, and be delivered to the KPIs stated in Schedule 4, Part 1, Price Performance Mechanism) and that the Customer Service Transformation Programme currently being undertaken will be complete by October 2012 and will realise the anticipated service efficiencies.

This includes the assumption that the 83.84 FTE identified to transfer to the Service Provider will be sufficient to meet the KPIs and handle the anticipated reduced call volumes at the time. For the purpose of generating a price for the ISDS submission, we have therefore assumed that the Council's assumptions are correct.

As directed by LBB, we are using the FOD v190412.xlsx contact data, which identifies the anticipated volumes of contacts and average handling times at the point of transfer. In order for us to match the contact volumes to the transferring budget, we have applied a 33% reduction to the volumes and applied Contact Centre FTE shrinkage at 37.3%, also assuming service performance will be at the levels stated in the FOD v190412.xlsx, with 75% of calls being answered in 20 seconds. Using this as our baseline point, we have then applied our interventions and investment to deliver the savings set out in Schedule 4, Part 2, the Financial Model and associated reductions.

For the purposes of the ISDS submission we have also excluded activity for Housing or Children's Social Care as directed by the Council and as discussed in dialogue we would expect to revisit this at a later stage to discuss whether these services should also be bought into scope.

At preferred bidder stage, we will work with the Council to confirm that the progress of the Council's existing Customer Services Transformation programme is as planned and baseline whether contact volumes are in line with the volume pricing assumptions laid out in Schedule 4, Part 2 pricing and at the performance levels . If for any reason any element of the predicted outcomes from the Customer Service Transformation hasn't been realised (e.g. volumes are higher at point of transfer or performance is not being met as per the target of 75% of calls being answered in 20 seconds), we will work with the Council to understand the reasons for this and look to accommodate the effects as a Reprioritisation Change. In the event that we are unable to do this, the Change Protocol set out in Schedule 14 will apply.

## 6.2    HIGH LEVEL IMPLEMENTATION MILESTONES

We have developed a high level implementation plan and an extract of the high level Transformation plan is detailed below. Further detail can be found within the Transition and Transformation method statements.
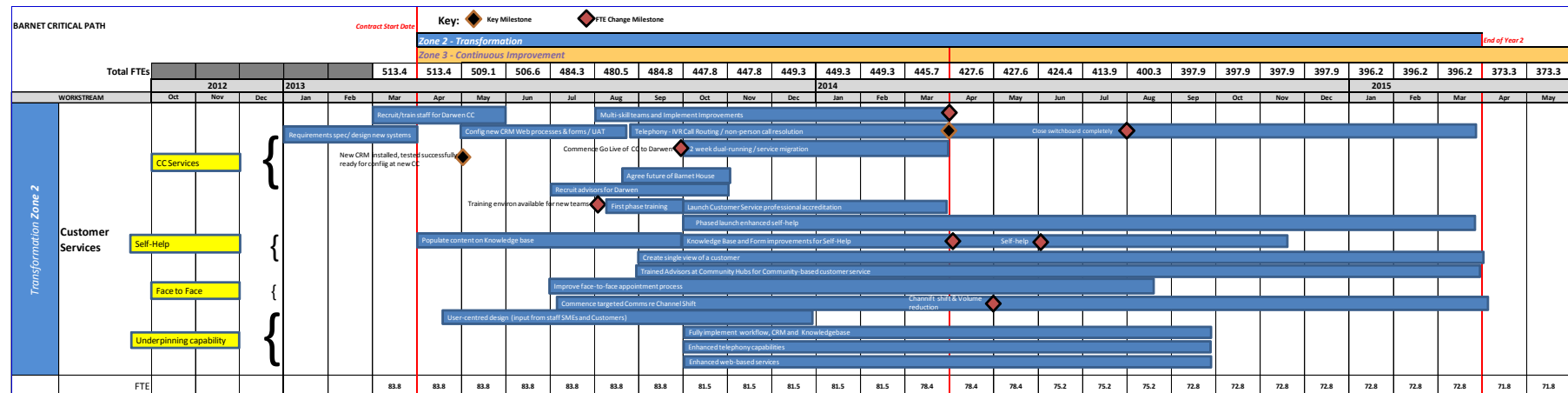
| BARNET CRITICAL PATH | | | | | | Contract Start Date | Key: ◆ Key Milestone ◆ FTE Change Milestone | | | | | | | | | | | | | | | | | | | | | | | | End of Year 2 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Zone 2 - Transformation | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | Zone 3 - Continuous Improvement | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total FTEs | | | | | | 513.4 | 513.4 | 509.1 | 506.6 | 484.3 | 480.5 | 484.8 | 447.8 | 447.8 | 449.3 | 449.3 | 449.3 | 445.7 | 427.6 | 427.6 | 424.4 | 413.9 | 400.3 | 397.9 | 397.9 | 397.9 | 397.9 | 396.2 | 396.2 | 396.2 | 373.3 | 373.3 |
| | | 2012 | | | 2013 | | | | | | | | | | | 2014 | | | | | | | | | | | | | | 2015 | | |
| WORKSTREAM | | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |

Transformation Zone 2 — Customer Services

CC Services — Self-Help — Face to Face — Underpinning capability

- Recruit/train staff for Darwen CC
- Requirements spec/ design new systems
- Config new CRM Web processes & forms / UAT
- New CRM installed, tested successfully, ready for config at new CC
- Multi-skill teams and implement improvements
- Telephony - IVR Call Routing / non-person call resolution
- Commence Go Live of CC to Darwen
- 2 week dual-running / service migration
- Close switchboard completely
- Agree future of Barnet House
- Recruit advisors for Darwen
- Training environ available for new teams
- First phase training
- Launch Customer Service professional accreditation
- Phased launch enhanced self-help
- Populate content on Knowledge base
- Knowledge Base and Form improvements for Self-Help
- Self-help
- Create single view of a customer
- Trained Advisors at Community Hubs for Community-based customer service
- Improve face-to-face appointment process
- Channel shift & Volume reduction
- Commence targeted Comms re Channel Shift
- User-centred design (input from staff SMEs and Customers)
- Fully implement workflow, CRM and Knowledgebase
- Enhanced telephony capabilities
- Enhanced web-based services

| FTE | | | | | | 83.8 | 83.8 | 83.8 | 83.8 | 83.8 | 83.8 | 83.8 | 81.5 | 81.5 | 81.5 | 81.5 | 81.5 | 78.4 | 78.4 | 78.4 | 75.2 | 75.2 | 75.2 | 72.8 | 72.8 | 72.8 | 72.8 | 72.8 | 72.8 | 72.8 | 71.8 | 71.8 |

**Figure 30 - High level implementation milestones for Customer Service**

## 6.3    HIGH LEVEL IMPLEMENTATION MILESTONES

Our implementation milestones include:

From **day 1**, our primary focus will be continuing to deliver the same level of services, whilst supporting staff who are undergoing the transfer process.

As previously mentioned, a crucial part to our solution is having key personnel in place during Transition and Transformation who will continue through into Business as Usual. Where appropriate, staff will be in place during Transition and Transformation and continue as part of Business as Usual to maintain knowledge, etc and establish continuous improvements.

### Year 0 - 18 months

Key Transition milestones and activities during this time include:

- From month 1, we will undertake our proven approach to embedding best practice across the Customer service operation. This will include **embedding our behaviours and values**, our approach to **resource and workflow management** and conducting a **'root cause analysis'** of existing services to ascertain 'quick wins'

- For the first six months following service commencement the **operation will remain in Barnet** with Contact Centre **service migration** (excluding ASCH) to the Darwen site from month seven onwards

- **Increase resource utilisation** of external calls through applying standard contact centre tools (workforce management, forecasting and capacity planning, performance and quality management)**Improve telephony resilience**, reviewing current policies and assessing immediate options for improvement

- **Commence routine communications for Channel Shift,** reviewing existing communications i.e. Council Tax bills, high volume letters, with the Council's Communication Team and prioritising the channels and channel shift through these.

Key Transformation milestones and activities during this time include:

- Conducting **User centred design** with Staff and Customers

- **Improvements in the face-to-face appointment process** via community advisors and issuing proactive reminders

- **Service Migration and dual running** - Contact Centre services will be migrated in 3 phases. This will be undertaken over a period of three months between the 2 sites, with dual running of CRM systems whilst this is underway We have developed a fully risked assessed implementation plan for the transfer of services

- **Implementation of technical interventions** (knowledgebase, portals, workflow, improvements to CRM, web) - our approach is to commence activities soon after Preferred Bidder stage in order to reduce the time required after Service Commencement Date through to implementation

- **Encouraging Channel Shift through promoting self-service** - we will work with the Council to review existing communications and refocus these on the new capabilities i.e. web and self-service to be the primary contact details, where appropriate

- **Increasing first time contact resolution** through the availability of a number of contact channels and ability to complete transactions via each appropriate channel, e.g. pay council tax online

- **Improvements to telephony** with the implementation of the Capita Managed Voice Solution (MVS), through IVR routing, natural language

- **Creation of a single view of a customer**, enabling staff to proactively tailor responses to customer needs and preferences

- **Refocus of Face to Face service delivery** - through our Community Engagement approach - 'Community-based' customer service located initially within existing sites, as well as being mobile in a 'tour rep' model, through surgeries and visits, reaching out to the community, supported by partners. Within the first six months for the F2F service, we will continue with the current service delivery as we explore with the Council the data we have collated regarding service provision, customer groups and channel shift propensity. We will also explore the current F2F demand and move to enabling appropriate "appointment only" access by face-to-face and/or online only for appropriate services.

We will achieve the successful transfer of staff through the delivery of a tailored Workforce Mobilisation Plan supported by our PeopleCare framework. The Mobilisation Plan provides a range of engagement and communication activities for staff, such as welcome presentations, staff bulletins, an email helpline, drop in sessions and one to ones. At service commencement, we will continue to deliver the same service, with the same people, in the same location, using the same processes and systems. In this way we will ensure no deterioration in service delivery as a result of the transition of services to Capita.

## 6.4    APPROACH TO KNOWLEDGE TRANSFER

We commit to developing our knowledge and understanding of current service delivery by:

- **Undertaking operational service reviews:** to build on our understanding to date and ensure we fully appreciate the way in which Customer Service is currently provided

- **Reviewing documentation:** it is critical that all current processes and procedures for the delivery of the service, including all known exceptions across the Council, are documented. This is to ensure that all knowledge is captured and no mission-critical information remains tacit and at risk of being lost through transition

- **Holding one to one meetings**: undertaking regular one to one meetings with the members of the service to ensure that they feel fully supported throughout the transition and are kept informed with regard to any changes made within the team regarding system, process and structure

▪ **Completing a full review of relevant policies and procedures** by SMEs within Capita and gaining a deep understanding of the current points mechanisms for allocation of cases

▪ **Analysing the status of all in-flight projects,** in addition to the Customer Service Transformation Programme and progress against milestones.

# 7 BUSINESS CONTINUITY

We plan to use the early months of Transition to develop the framework to deliver a comprehensive Business Continuity and Disaster Recovery (BC/DR) Plan across all services delivered through the Partnership. The plan will be developed in 3 stages

▪ Stage 1 - to address the immediate and most pressing business continuity requirements, prevailing at the time we take over the services

▪ Stage 2 - to cover the changes that will take place throughout transformation, up to the realisation of the SDM. As the transformation will involve many location and system changes, this plan will of necessity be a dynamic model, in need of regular refresh to retain currency. It will also address BC/DR arrangements for those services being retained in Barnet

▪ Stage 3 - A Strategic Plan, to be developed during the Transformation programme, to cater for the BC and DR requirements going forward, once transformation is complete. This will also cater for special projects commissioned and delivered during the post Transformation, BAU period.

If premises are not available during Transition for a short or medium term period, we will identify agreed alternative locations in the BC/ DR Plan, either existing LBB-controlled property or those currently occupied by Capita (e.g. the appropriate service Centre of Excellence location). All the Capita locations which we plan to migrate the services to during Transformation have access to alternative locations as part of their existing BC/DR arrangements.

## 7.1 BUSINESS CONTINUITY DURING TRANSITION

We understand the importance of the Council having confidence in our ability to support service delivery during unexpected and emergency incidents. Within our submission we have described in some detail within the Transition Method Statement our approach to working with you to establish quickly your detailed and specific requirements in the event of a disaster or service disruption. The degrees of service failure and the timescales for normal service to resume will influence the action taken in each case. Our plan is to undertake a Business Impact Assessment within the first weeks of our partnership during which we will identify your critical activities so that we can agree the priorities for cover during such instances and this will also capture your requirements for service levels during the disaster or emergency period. From this we will assess the gap in current provision and also design the BC/DR solution for the Contact Centre once the service has moved off site to Darwen recognising that the critical service of Adults will remain on site in Barnet so arrangements for both locations will need to be robust and meet your requirements. These detailed plans will be agreed with you and implemented within the first year of the contract and will subsequently be reviewed on an annual basis. In addition to the plan we will jointly agree protocols for deployment in the event of emergencies or unforeseen

events which will govern the process for decision making and any impact on service levels when there is a need to divert resources to support other prioritised activities.

For now we have also identified the following key activities that will be undertaken urgently upon partnership commencement:

▪ We recognise that the Council's business is at risk as there is currently no DR solution in place. In order to protect the Council's key services in the event of a disaster, we plan to implement an interim solution at the outset of the contract which will encompass a 'Ship to Site' disaster recovery solution for the Council's Platinum (such as Swift) and Gold systems

▪ Once the DR plan is invoked, we aim to ship pre-configured and system loaded equipment to site within four hours. Specialist recovery engineers will attend to provide the necessary technical support in linking the replacement equipment to the Council's infrastructure.

As stated within Section 1, we will relocate the customer services contact centre to Darwen. This is already a well established contact centre operation, with existing Business Continuity arrangements in place. Subject to the agreed plans and priorities in the event of a business continuity invocation we can be relocated and operational at the alternative site within 24 hours.

## 7.2   BUSINESS CONTINUITY AND DISASTER RECOVERY

We understand that the Council has responsibility for the provision of many services recognised as being critical to the health, welfare and quality of life of the residents of Barnet and that the Council is committed not only through Corporate Resilience Policies but many statutes (incl. Civil Contingencies Act 2004), moral and social obligations, to ensure these are continually delivered.

It is important that any interruption is limited in both time and impact. The Business Continuity/Disaster Recovery plan which will be agreed during Transition and subsequently annually will contain concise and appropriate instructions to manage an unplanned interruption for all aspects of the services including the contact centre, face to face services and web services. It will also include details of key contacts, both internal and external, and detailed roles and responsibilities. The BCDR Plan will be maintained and owned by the Head of Service, with overall BCDR plan being owned by the Partnership Director, and the plan will be reviewed annually at a minimum (and following every instance of a Business Impact Assessment) and amended and re-tested accordingly.

The Council's services will be underpinned by a new robust infrastructure as a result of the migration of the Council's key IT applications and services to our new data centre. This will include the provision of disaster recovery services to ensure the availability of all platinum and gold applications including the Council's website, telephony solution, CRM and other systems critical to the CS operation.

Capita also has a number of Shared Service Centres and other client sites, including neighbouring authorities that can be utilised in the event of a DR or BCP event which can provide the capacity and skills to ensure there is no service disruption as a result of a localised disaster.

## 7.2.1 EMERGENCY SITUATIONS

In an emergency situation we can also leverage the website and contact centre to provide business continuity services for the Council and its partners. Our solution will align to the provisions of the Civil Contingency Act and ensure that LBB perform their duties in accordance with the Act by:

- Assessing the risk of emergencies occurring and using insight to inform our Business Continuity Plan (BCP)

- Putting in place robust, tried and tested business continuity management arrangements and emergency plans

- Making information on civil protection matters and emergency planning available to the public

- Utilising the contact centre to maintain arrangements and to warn, inform and advise the public in the event of an emergency.

We will use our experience, alongside the guidance of the Council, to develop processes and scripts which enable the contact centre to adapt and implement emergency procedures for those identified critical services and within the timescales agreed as part of the BC/DR planning process described above. Typically we have potential to re-route calls to alternative sites within 30 minutes of service disruption and this will be agreed at the point of sign off of the plans and procedures.

Our Shared Services centres, and Centres of Excellence, can be called upon in times of crisis to pick up overflow calls. Calls can be re-routed to other Capita sites; contact centre scripts, information and LBB specific procedures can be accessed remotely via our CRM and document management solutions. Scripts and briefing notes will be developed to enable resolution of contacts by an overflow site by handoff, information or - where the IT solution supports - transaction.

Our Shared Service Centres also provide LBB with the capability to perform duties on behalf of other councils or not-for-profit organisations during a prolonged emergency situation, in accordance with the provisions of the Civil Contingency Act. During times of need we will identify suitable resources to perform additional duties and develop robust implementation and exit plans for the provision of these services. The protocols for unforeseen events will be deployed and support such ad hoc requirements.

Service messages will be put on the telephone lines to advise customers of loss of service and advise other ways to obtain information and services, for example in the circumstance of a broadband outage preventing customers from accessing the LBB website, the contact centre can provide continuity of service by resolving queries, booking appointments or taking payments over the telephone. If severe flooding is experienced, our IVR messages will be updated allowing callers to be directed to a dedicated flood line. All messages and IVRs will be made in agreement with the Council.

As your partner, we will work alongside you to put in place arrangements to make information available to the public about civil protection and emergency situations. We will adopt a best practice approach and utilise our IT solution to warn, inform and

advise the public in the event of an emergency, for example by expanding the use of include SMS and social media updates.

The contact centre staff will make outbound calls to customers, employees and partners in emergency situations. Where possible proactive contact will be made with residents and staff. For example, to staff: in the event of an office closure; or to parents: in the event of a school closure. This proactive 'push' management of workload can be critical in allowing resources to focus on the incident in hand.

### 7.2.2 BUSINESS CONTINUITY - SERVICE FAILURE

It is important that any interruption is limited in both time and impact. The BC plan will contain concise and appropriate instructions to manage an unplanned interruption. It will also include details of key contacts, both internal and external, and detailed roles and responsibilities.

The BC Plan will be maintained and owned by our Head of Service and the plan will be reviewed regularly (at a minimum following every instance of Change Control Impact Assessment) and will be amended and retested accordingly.

We will develop Business Continuity and Disaster Recovery Plans in consultation with the Council to meet its requirements and incorporate the BC/DR plans already in place for the in scope support services. In addition to planning for emergencies, we will periodically assess the risk of an emergency occurring, and establish mechanism for reducing, controlling or mitigating its effects.

We will develop these in line with our overarching Business Continuity Management Lifecycle which is fully aligned with BS25999-1:2006. In addition to planning for emergencies, we will annually assess the risk of an emergency occurring, and establish a mechanism for reducing, controlling or mitigating its effects.

We will adopt a multi-channel approach to managing incidents, for example, we will provide regularly updated incident information online with the aim of reducing calls to the Contact Centre.

In an emergency, we will deliver services through the website and from the contact centre in accordance with the Business Continuity Procedure. We will formulate the procedure under the guidance of the Council.

We will ensure that all sites which deliver services for LBB have disaster and business continuity provisions in place - including the ability to transfer operational activity to an alternative location. In line with the agreed critical activities and priorities for the Council during such events we can implement a failover site for the contact centre allowing calls to be easily routed to another site in an emergency. This solution provides additional resilience for the contact centre as calls can quickly and accurately be re-routed to multiple back-up locations. These arrangements will need to be balanced in terms of the costs of maintaining failover sites versus the options to prioritise critical activities and lower cost options to divert resources and take advantage of capacity at other shared service centres to which we have access.

Consistent use of information across all channels strengthens LBB's business continuity and emergency service offering by enabling re-direction of customer contacts in emergency situations. For example, if the contact centre is unavailable due to an emergency, or there is an unusually long wait time, customers can be

directed to alternative channels and will receive consistent messages and information regardless of the channel used. This practice is also an enabler to switching off more costly channels in the future should the Council decide to adopt more radical service delivery solutions.

### 7.2.3 PROLONGED EMERGENCY SITUATIONS

When emergency situations arise we acknowledge that it is critical to customers that we provide sustainable solutions, capable of running Business As Usual (BAU) for prolonged periods. We also acknowledge LBB's specific obligations under the Civil Contingencies Act. We will provide sustainable solutions for LBB by leveraging capability across the wider Capita group, for example by transferring calls to our other Contact Centres during an emergency to provide continuity of service and to allow the LBB Contact Centre staff to undertake recovery activities and these will be in line with the plan agreed (and reviewed annually) following the Business Impact Assessment. We will use this expertise to fulfil LBB's obligations where the nature of the emergency requires LBB to undertake additional functions, such as providing services on behalf of a Council or other not-for-profit public body.

We will maintain a Business Continuity Plan (BCP) for recovery from serious outage of the Contact Centre, Building or technology affecting the Contact Centre. Our BCP will be underpinned by the Capita Group's overarching Information Security Policy Charter, BS25999 British Standard for Business Continuity and the plan will be aligned with the Business Continuity Institute (BCI) Good Practice Guidelines and ITIL Service Continuity Management.

### 7.2.4 SPECIFIC BUSINESS CONTINUITY SOLUTION

Our specific contact centre business continuity solution provides the following across the contact centre sites within Capita:

- High level of technical resilience built in as standard

- Documented, robust and proven business disruption management processes

- Experienced business continuity staff

- Experienced incident management team

- Optional provision of off-site work area at our disaster recovery site.

Capita's service desk is the single point of contact between the operational unit and IT for incidents and service requests. It is the responsibility of the Service Desk team to provide first line management of all incidents to minimise degradation of service.

To ensure effective management of the incident, when an incident occurs the Service Desk will contact the support teams affected, maintain details of the incident and monitor the ongoing situation. The BSD team will liaise closely with third party support/help desk teams if the incident affects systems that are their responsibility. The Service Desk also manages a clear escalation process and will alert the Capita incident management team (IMT) and the business continuity manager should a situation be expected to persist for longer than 24 hours. In this instance the IMT will take control of the disruption.

Capita's business continuity management framework ensures plans exist for all support areas of our normal core business functions. Plans outline how a major incident affecting Capita will be managed in relation to each function, including invoking an incident management team of senior managers in accordance with agreed principles. These procedures ensure business areas can be recovered as quickly as possible to ensure any impact or disruption to client operations is minimised.

Capita has procedures in place to deal with external threats such as bio-terrorism, suspicious packages and bomb threats.

The IMT's aim is to facilitate a recovery of the affected business area and it has full authority to manage the incident, as it sees fit to do so. The IMT is comprised of senior representatives from the business who have the relevant experience and training to manage serious disruptions. The IMT will become the strategic level business continuity team for the contact centre.

In the event of the IMT being invoked the senior management team for the contact centre will become the tactical business continuity team responsible for recovery of the operational unit.

Upon resumption of service Capita will commence a number or procedures to minimise the impact of the outage. The contact centre will be managed to return to agreed service levels efficiently and effectively as soon as practicable. Arrangements may also be made by Capita for staff to work overtime, and we may transfer staff where appropriate, from other business units to process the backlog of work until normal service can be resumed.

Care and attention in maintaining the correct level of data security throughout the entire process is of paramount importance. The information security manager will be responsible for monitoring operational activities throughout the service resumption period.

## Inherent Resilience

In order to maintain a high level of availability and continuity of service, Capita builds, as standard, a high level of resilience into its building, technical, and operational infrastructure. Key processes have built-in redundancy and back-up devices. For example, UPS devices in all communications rooms are maintained, dual processes and dual power supplies on our communication links, building management monitoring systems with 24 hour response, and documented procedures for incident handling.

Significant resilience is built into hardware solutions as standard to keep operations running:

- Telephony and Network

- Private circuits linking our sites to allow call transfer across different locations.

- All links to the Avaya switches are via dual points of entry and diverse routing.

Telephony hardware is on a 4 hours response and fix maintenance contract in addition to the Capita maintenance capability.

The Capita switch has built-in redundancy comprising dual processors, dual power supplies and dual shelves which provide complete system security in the event of the switch failing. The switch also has backup battery capability in the event of a power failure. All communication links have secondary back-ups, which take over in the event that one of the principal links fails. This is relevant to our Darwen site and we will review the improvement of resilience for services remaining in Barnet in view of how long we plan for them to remain there.

Dual homed internet links to ensure access to the web is still available in the event of the primary link being severed. Triangulation of links allow alternative routing of calls and data. The core WAN for Capita is designed to ensure that if one link to a Capita site is disconnected all sites will still communicate through alternative routes.

# 8    COMMITMENTS - CUSTOMER SERVICES

We commit to developing and delivering services to meet the needs of the London Borough of Barnet as expressed in your Output Specification. We have detailed our overarching commitments within Schedule 35.

# 9    KPIS

Please see the Payment Mechanism, Schedule 4 part 1 for full details of the Key Performance Indicators that will be in place.