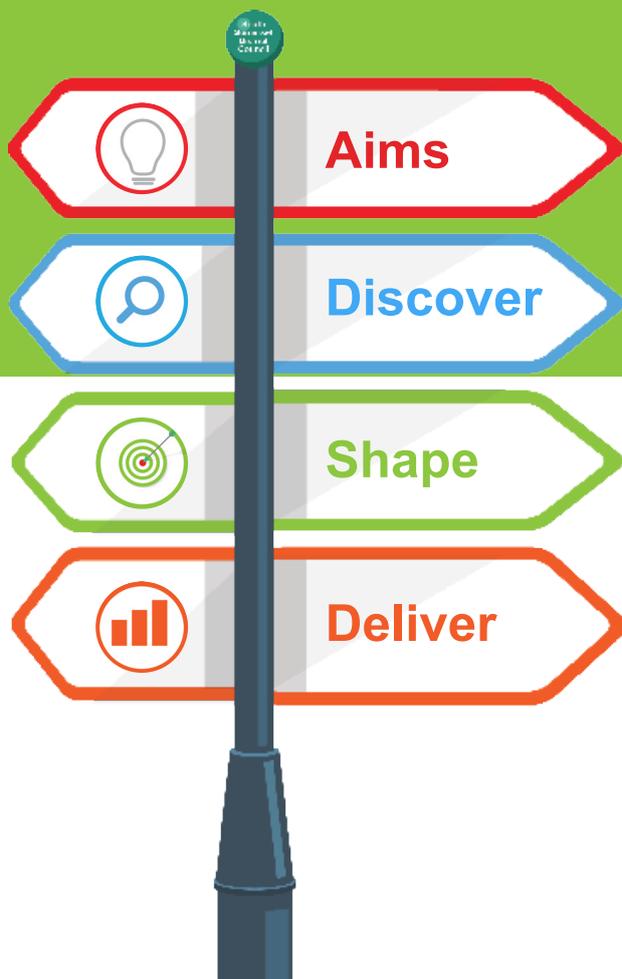
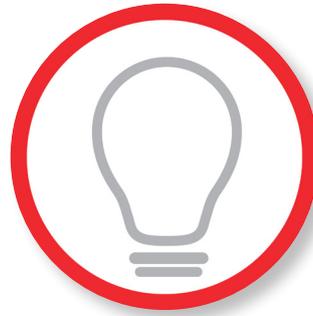


# Customer Access Strategy 2018



# 1. Aims

- This sets out why we need the strategy



## 1. Aims: Why do we need a Customer Access Strategy?

- 1.1 SSDC is currently transforming into a modern, effective organisation; one where we are ambitious for our communities and where customers will find it much easier to gain access to what they need from us. **The Customer Access Strategy sets the direction for assuring the accessibility of our services for customers as we transform, with a focus on moving many of our services online.** It forms a critical part of our transformation plan.

One of the core aims which underpins the Transformation programme is to 'Lead the Way, Delivering for our Communities'. We want to deliver improved levels of customer service and satisfaction, despite falling budgets by providing:

- o 24/7 Self-service channels for all services possible (internal and external)
- o Preservation of face to face help for those customers that need it
- o Fast resolution of customer enquiries
- o Reduction in customer demand for target services
- o Reduction in avoidable contact / failure demand
- o Single view of all customers (Golden Record)

- 1.2 Our customers need and want services that are easy to access, simple to use, reliable and cost effective. When they need information, it should be easy to find and easy to understand. These are fundamental and unchanging requirements. However, external factors may prompt a change in our approach to meeting these needs.

1. The availability of new technologies will help us deliver services in new ways. More widely available internet access and mobile technology mean that customers expect to access services and be able to connect with us anytime and anywhere. Being able to self-serve offers our customers a way of interacting with us when it is most convenient to them and is attractive to many.
2. The budget pressures that Councils have been experiencing means that, if there are ways of delivering services more cost effectively, while maintaining or improving the quality of our service, we should explore them.
3. Capturing customers' interactions with the Council digitally permits us to capture an electronic record of the customer journey whilst also minimising human error.
4. Tools for capturing and analysing data enables us to better understand our customers and our services so we can make improvements and manage demand.

- 1.3 We know that some of our customers are either not able, or choose not to access our services in this way. This strategy, whilst embracing the shift to digital channels and self-service, ensures that customers who need to access services either face-to-face (via our front desks or locality teams) or over the 'phone may still do so. It builds on research and best practice and is driven by customer needs. It sets out our aspiration for customer access, the principles that shape what we do and how we will engage customers and other stakeholders in its delivery.

Our stated aims emanate from two of the Council's objectives, incorporated within the Council Plan:

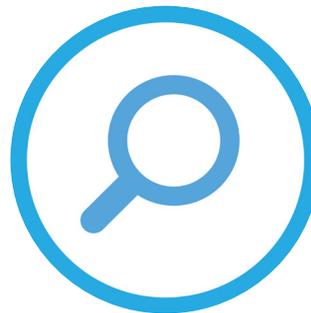
1. In order to protect front line services, we will transform customer services through technology, and
2. Provide access to services to suit our customers' needs

These objectives will be embedded into the Council's annual business plans for delivery and are subject to the Council's standard risk and performance management process. They are underpinned by some of the Council's core values:

- a) Putting the customer and community first when developing plans and services
- b) Supporting people and communities, enabling them to help themselves
- c) Being open, transparent and with greater accessibility to those that need to use Council services, and
- d) Embracing innovation and improved technology to improve customer service and access

## 2. Discover

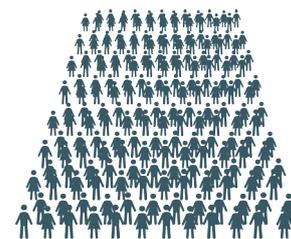
- What do we understand about our customers and communities that has informed the strategy?



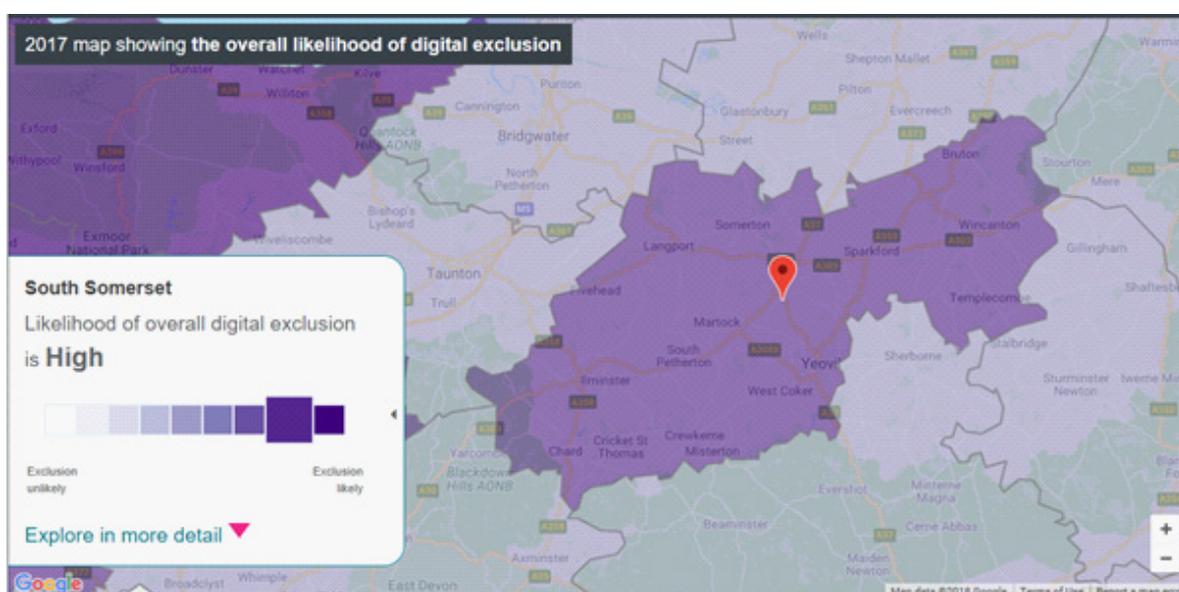
### 2. Discover: What do we already know?

We need to be clear about who our customers are, the level of service they want, how customers currently access our services and how they might be able to access those services in the future. South Somerset's residents have widely varying needs and are spread across a large geographical area. Each local area has different expectations and needs and we will continue to meet those needs through the Area structure and Locality teams.

#### In South Somerset...



- 2.1 South Somerset has a low population density of 1.7 people per hectare of land compared to an England average of 4.1. This means that we have a very dispersed population, with at least 50% of the population living in settlements with a population of fewer than 10,000 residents. This dispersal pattern has implications for our customers in accessing services face-to-face. During a February 2018 survey of customers coming to the front desk at two of our offices, customers were asked their reasons for attending in person and how they had travelled there. Amongst those attending our Brympton Way office, one-quarter had made a special journey by car to attend, adding congestion to our roads.
- 2.2 The rural nature of our district means that many of our settlements do not have the infrastructure necessary to enable digital access. Many have poor mobile reception – almost a half do not have access to 4G, for example - and/or low broadband speed. These have been combined with other factors, which may indicate risk of digital exclusions, such as age, income, education to generate an overall risk of digital exclusion. South Somerset is an area with a high risk of Digital Exclusion.



- 2.3 We already have customer insight, feedback and the outcomes of consulting with different customer groups and partner organisations which have helped us understand the requirements of our customers and also identify those customers that may be vulnerable or have specialist requirements. We will continue to use customer and partner information to ensure that we are responding to customer need in the right way.
- 2.4 We already know that one in six of those attending during our February 2018 survey said they find it easier to communicate face-to-face due to speech, language or hearing difficulties. One in twelve do not have access to a computer or website access on their 'phone. We know that we have a growing number of dementia sufferers; in South Somerset there are currently an estimated 1,565 residents aged 65+ living with dementia and many of these may have partners or relatives who take on the role of carer. Identifying these customer groups for whom online services and self-serve may not be the most suitable type of access, will enable us to develop our services to meet all of our customers' needs and ensure that no-one is excluded or disadvantaged when accessing services. We will provide an efficient Customer Focussed team which will meet the needs of these groups through face-to-face or telephone contact.

- 2.5. When we observe why customers made face-to-face visits, three out of five of these are for help with Council Tax, benefits or to provide documentation for verification for benefits. A further one in six were related to planning applications. In respect of our telephone contact centre, three in ten of all requests are accounted for by Council Tax payments. Three in ten visits were made simply because the office is close to the customer's home. In principle, we would wish to move as many of these interactions online as is possible, if this can be done without detriment to our customers.
- 2.6 Somerset Homefinder achieves almost 100% online submission of registration forms; however, it is evident that many customers seek help with completion of these forms and, for many, this is an ongoing need for support with subsequent interaction. We therefore recognise that, even where a service is moved 100% online, this does not necessarily mean 100% self-serve. Homefinder has not yet managed to make the service fully digitised, as documentation still needs to be verified face-to-face.
- 2.7 Observations of the reasons why customers attend our community desks in person showed that for many there is deep-seated resistance to accessing services online, which may stem from more hidden reasons, such as not being confident with computer skills, or poor literacy levels. Many report that they have no credit on their 'phone. We are also aware that some customers are more reassured by conducting some transactions face-to-face, so that they know the correct documentation has been processed in support of a benefit payment, for example. This is especially the case where the consequences of the process falling down are severe for the customers. Many requests are also multi-layered, requiring some unpicking and customers feel more confident that these layers can be resolved individually face-to-face.

### 3. Shape

- Specific outcomes that we expect to deliver



#### 3. Shape: What do we undertake to deliver?

- 3.1 We want to deal with more customers at the first point of contact, with staff signposting self-serve options where suitable for the customer's needs and channelling customers towards our existing information points and partners. We are already doing this to some extent, but this will need to be accelerated as more services become available online. More customers will be able to self-serve, but only if we tell them about our online services and only if the services are easy to use. Looking to the future, we will keep our finger on the pulse of new ways of delivering services, considering risks while not being afraid to challenge the norm in order to deliver effective and efficient services for both our customers and the Council.

- 3.2 We will pay due regard to our responsibilities under the Equality Act 2010, and the General Equality Duty in particular, to ensure that no one is disadvantaged or excluded from accessing information or the services they require. Where appropriate we will involve residents/partners in the design of accessible solutions and provide support in accessing services where they are not able to do this themselves and have no-one to help them.
- 3.3 We will comply with the General Data Protection Regulations, Article 5, which set out the principles governing the recording and use of personal data.
- 3.4 We have identified a set of design principles for how we will communicate with, involve and serve our customers, some of which are pertinent to how we design access for customers. The following design principles form a core part of our Customer Access Strategy:



### 3.5 More specifically, in relation to customer access:

- Every service possible will be provided online
- We will provide customers with a personal online account where they can view letters and other documents, make service requests and track progress of their service requests
- The first point of contact into the Council will be through the Customer Focussed team
- We will design our website and online forms such that they are 'comprehensive, efficient and available to all who wish to use them'. We will use Assistive Technology to improve access for some groups and we will learn from best practice in designing these
- All website content, forms and letters will be written in plain English, with assistive technology ensuring the we can share them with everyone
- Customers will have the ability to save and return to online forms that are lengthy or complex
- Staff will assist customers to use the online forms if they visit the Council
- We will respond to feedback from customers to ensure continuous improvement in how customers access the Council
- We will help customers develop the skills necessary to use online services by training our staff so that they can help guide customers, working via our locality teams with partner organisations and Parish Councils and by supporting Members so that they may help their constituents
- We will provide suitable alternatives for those not able to use digital services for whatever reason
- We will support our staff in being able to identify where customers may need additional support and how to help them to access the necessary services in a way that is easy and meets their needs
- We will utilise access to computers and the internet for customers' use in local community hubs and signpost to other available access points



3.6 Our front-of-house customer service will be reviewed and redesigned to maximise our digital opportunity and to ensure we are able to provide an alternative for those who are not able, or choose not to contact us digitally or by phone. Our front of house customer service includes our offices and any community hubs which we use for face to face contact with our customers. We will look to:

- Create an environment that enables and promotes self-serve to customers
- Provide face to face assisted access to online services to help customers help themselves
- Provide a multi-service access point giving accurate advice and guidance
- Explore opportunities to provide multi-agency support to vulnerable customers
- Explore new and innovative ways of providing a front facing service, such as Skype
- Explore the use of community hubs, town & parish councils, health facilities, libraries and other locations for assisted access

## 4. Deliver

- How will we measure outcomes so we know whether we've been successful?
- What plans are in place to monitor and review to ensure continuous improvement?



### 4. Deliver: How will we know we've been successful?

- 4.1 The government's formal measure for assessing channel shift is the number of completed digital transactions over any fixed period divided by the total number of transactions from all channels in the same period. If the customer was assisted with the digital transaction this is included as a digital transaction for the purpose of this indicator.
- 4.2 There are a number of additional measures which will be used to track and monitor outcomes:
- We will monitor, as a proportion of all online accounts, the number that have been activated
  - We will be able to evidence that 100% of services that are able to be accessible online will be available online
  - The whole authority will record customer contacts, which will be used to create an individual profile for each customer
  - Customer feedback will rate our website as comprehensive, easy to use and accessible
  - Customers will have high rates of satisfaction with our telephony and face-to-face services
  - There will be an increase in take up of payment by direct debit and/or online payment
  - Our website will meet the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA (Intermediate) as a minimum standard
  - We will monitor the number of abandoned online transactions, investigate the reasons for this and implement remedial action
  - We will monitor and analyse failure demand, to be aware of the numbers of customers contacting us that should not have to and the reasons why
  - We will periodically ask representative samples of our customers, their views on access to our services
- 4.3 We plan to undertake benchmarking now and then monitor our achievement over the course of the coming year, whilst our services are increasingly made available online. It is for this reason that our approach to customer access, and our Strategy for delivering it, will be reviewed in 12 months.