

## **CABINET – 16TH SEPTEMBER 2021**

### **Report of the Head of Customer Experience Lead Member: Councillor Roy Rollings**

#### **Part A**

#### **ITEM 15     CUSTOMER SERVICE STRATEGY 2022 - 2025**

##### Purpose of Report

This report presents the updated version of the Customer Service Strategy for the period 2022-2025. It is intended that the updated Customer Service Strategy (subject to any amendments required by the Cabinet) be recommended to Council for approval

##### Recommendation

That it be recommended to Council that the Customer Services Strategy 2022-2025, as set out in the Appendix to this report, be approved

##### Reason

To identify the priorities against which the Council will seek to maintain and enhance our Customer Service capabilities over the period 2022-2025.

##### Policy Justification and Previous Decisions

The Customer Service Strategy falls within the Budget & Policy Framework, and its approval is therefore reserved to full Council.

The Council's previous Customer Service Strategy expired on 31<sup>st</sup> March 2021; this new strategy leads on from its predecessor to ensure continuity in the development and commitment to delivering high quality customer service. Whilst there is no statutory requirement for the publication of a Customer Service Strategy it is seen as good practice. This reflects that Customer Service is a key element within the Council's existing service delivery mechanisms and a priority of the current Corporate Strategy (2020 – 2024).

Specifically, Theme 4, 'Your Council' of the 2020 – 2024 Corporate Strategy references 'we will continue to improve customer service and develop our staff to help them to deliver outstanding services'.

In addition, in our Strategic Direction document (2020-24) it is set out under the 'Our People' section that we will:

- maintain a focus on customer experience and put the customer at the centre of our thinking
- increase the number of online services so customers can access them 24/7
- use customer insight and feedback to improve and deliver services
- focus on delivering high customer satisfaction levels

## Implementation Timetable including Future Decisions and Scrutiny

The strategy will be implemented over the financial years 2022 to 2025. The development of the detailed roadmap and required actions is currently being developed.

### Report Implications

The following implications have been identified for this report.

#### *Financial Implications*

There are no additional financial implications from the Strategy itself. However, actions arising from the implementation of the Strategy will wherever possible be financed from within existing budgets or, where funding is required from capital reserves or the Reinvestment Reserve, which will be subject to separate decision-making processes and approvals in line with financial procedures

#### *Risk Management*

The decision Cabinet is asked to make and proposed actions to mitigate those risks are set out in the table below.

<b>Risk Identified</b>	<b>Likelihood</b>	<b>Impact</b>	<b>Overall Risk</b>	<b>Risk Management Actions Planned</b>
Failure to meet identified actions if resources and cross-council service engagement is not achieved	Likely (3)	Serious (3)	Moderate (9)	Senior Officer involvement in the implementation of the Strategy through: <ul style="list-style-type: none"><li>• SWaP Board, made up of Senior Officers considering a wide range of projects across the Council</li><li>• Implementation will be considered in line with other Strategies such as the People Strategy and the Transformation Programme</li></ul>

Key Decision: No

Background Papers: None

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## Part B

### Background

1. Keeping customers at the heart of what we do is integral to the way that the Council delivers its services. The strategy sets out how the Council intends to develop its customer service offering over the next three years to meet the changing needs of our customers. Delivering a positive customer experience is the responsibility of every officer and stakeholder across the Council, with each interaction providing the opportunity to develop productive relationships with our customers. The Strategy outlines how we will adapt to the changing needs of our customers and reinforces our commitment to providing fair and open access to our services
2. Charnwood is likely to witness significant challenges and changes in the next three years. The COVID-19 Pandemic has had a significant impact on service delivery and future planning. There will be increasing financial pressure with the ongoing funding reduction from Government. Further pressure will come from changing population and changes in legislation. The shape and size of the Council is likely to change and increase but the need to provide high quality services to our residents will remain. With these new challenges will come new opportunities to use technology to enable the Council to achieve efficiencies while maintaining and improving service delivery standards.
3. As an organisation we recognise that our customers have varying needs and whilst there will be significant focus on developing more digital, self-service channels it is recognised and acknowledged that these contact methods will not be suitable for all of our customers. Therefore the Strategy provides a commitment to ensuring that our services are accessible to all
4. Aligned to the corporate strategies of the Council, this document sets out the vision and outcomes the Council wishes to achieve in relation to its Customers. The Customer Service Strategy is presented as an appendix to this report.

### Appendices

Appendix A - Customer Service Strategy 2022-2025  
Appendix B - Equality Impact Assessment

**Charnwood**  
**Borough Council**  
**Customer Service**  
**Strategy**  
**2022 – 2025**

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# Foreword

Charnwood Borough Council is committed to providing exceptional customer service. This strategy sets out how that will be achieved over the next four years. Our ambitious programme of transformation will see the very latest technology utilised to help us provide the exceptional service we constantly strive to achieve.

The COVID-19 Pandemic has seen a clear shift in the way customers wish to engage with the Council. Our online presence is critical to capturing this shift and ensuring we are available when customers need us.

This strategy commits to further invest in our website and online forms to ensure we are as accessible as possible whilst recognising the need to be physically available to deal with the needs of some customers.

Every customer interaction matters, and it requires a whole organisation approach to achieve exceptional customer service.

Our strategy is bold, ambitious, but most of all, achievable.



Cllr. Roy Rollings

Lead Member for Transformation

# 1.Executive Summary

Charnwood Borough Council is transforming the way that it interacts with its customers. This strategy provides the vision and principles for this transformation and in doing so, outlines our ambition and appetite to meet our customers' needs.

This strategy sets out our vision to achieve the best possible experience for our customer, whoever they are (residents, businesses, partners, or suppliers) and whenever they deal with us.

Effective management of a customer relationship is not only about how responsive, efficient, and technologically advanced services are, but is also equally about the emotion, feeling and impression that an individual experiences when interacting with an organisation.

This strategy enables the authority to move away from a view that customer service is the responsibility of a team or department, but instead recognises that it is a cross cutting theme that spans the whole organisation and links intrinsically with our wider plans. It enables customer experience to become part of our core vision and values framework that each and every officer subscribes too. This strategy raises the profile of the customer ensuring that our plans, decisions, and business actions, are customer centric.

We are aware that both the technology landscape and our customers' preferences are changing at an ever-accelerating pace. This is at a time when the resources available to Local Government are decreasing. We now need to harness digital technology to find new, innovative, and efficient ways of enabling our customers to interact with the Council, whilst at the same time releasing our capacity to support those customers that really need us.

The strategy outlines how we will deliver this change and reinforces our commitment to providing fair and open access to our services. This strategy provides the mandate to mobilise an ambitious change programme that will transform the authority's approach to customers.



## 2.Introduction

The way most people do business and communicate is changing rapidly. We use cash less and pay by card more, we go to the shops less and order things online more, we write letters less and use email more. Many of us contact organisations through social media now, rather than give them a call, email or visit in person. And, increasingly, we're doing all these things from just one device, be it a smartphone, laptop, or tablet.

Charnwood Borough Council, like other councils and central government, has made more and more of its services available over the internet, and this move to online will continue. Most people find it more convenient to get information or to access services in this way. For those who find this difficult, we will provide help to support the online transition. Where this isn't possible, we will continue to provide a support to customers to make all of our services inclusive.

The new ways of doing business also save us money, which is now more important than ever. We have far less to spend than we had a few years ago. Charnwood has been very successful in maintaining front-line services while Government funding has been falling. We need to keep striving to make the most of every pound we get. Every time customers access Council services online they are helping us save the money we need to maintain the public services on which thousands of people rely and enjoy every day.

This Customer Services Strategy places our customers at the heart of the organisation. It seeks to modernise and improve the authority's approach to customer service, through investing in material, human and technological resources, in response to a rapidly changing customer expectation.

To date the authority has made targeted attempts at improving customer experience through various programmes and initiatives; significant investment has been made in developing digitalisation and the online customer experience. The strategy builds upon this previous work, to deliver the systemic change required to transform customer experience and realise the benefit of previous investment.

This Strategy outlines the underlying principles, foundation, design, and recommended approach to transforming the way in which we interact with our customers. Its adoption will enable the systemic change required to transform the organisation's customer service offering over the period 2022 – 2025.

## 3. Customer Service – Our journey so far

Over the past four years we have strived to improve the way we work to meet the needs of our customers. We have implemented some key improvements to the way customers interact with us and we communicate with them, this includes:

A refreshed website where you can access a range of online services

A new telephony system offering greater functionality and reliability

Reaccreditation under the Customer Service Excellence scheme

Introduction of a new online booking system for school holiday activity schemes

### Our telephone services

Over the last four years we have introduced a new telephony system ensuring our systems are modern, resilient, and reliable. We have introduced new services and updated and improved others to ensure customers receive an efficient, effective, and friendly service when contacting us.

In 2019/20 the contact centre dealt with 130,000 telephone calls

### Our face-to-face service

Our Customer Service team deal with a wide range of face-to-face enquiries, they provide digital support to customers when required as well as answering enquiries of topics ranging from waste services to elections and housing benefits.

In 2019/20 42,500 customers visited our Customer Service Centre

### Our online and digital services

We have improved our website which is now fully mobile, and work is well underway to ensure accessibility standards are met. Our website is available 24 hours a day, 365 days per year and provides easy access to a wealth of information and over 55 digital forms.

In 2019/20 we had over one million visits to the corporate website

In addition, we also introduced sharing information through a range of social media platforms including Facebook, Twitter, Instagram and Linked in to widen our accessibility. By March 2020, we had over 12,745 followers across all of these platforms.

## **Our customer care commitments**

In 2019 we reviewed our previous Customer Service Standards which were outdated and replaced them with a new Customer Promise which sets out what our customer can expect when interacting with us and equally what our employees can expect from our customers, this promise aims to create an environment of mutual respect.

In 2020 we retained our Customer Service Excellence accreditation showing that Charnwood Borough Council is committed to delivering high quality customer centric services.

## **Our customer satisfaction**

As a Council, we have consistently maintained high levels of customers satisfaction. In 2019/20 over 90% of our customers rated us as good or excellent both on the phones and face to face. However, there is always more we can do to improve and so we will consider how we can make this easier and simpler for our customer to give us feedback.

## 4. Customer Service in numbers

The diagram below shows the number of interactions our customers have had with us in 2019/20:



The 2019/20-year data has been used as this provides a useful pre pandemic baseline for comparison against the most recent figures shown later in this document.

This data does not tell us about other key areas of customer service we deliver across the council, or about the interactions our customers have with other back-office teams.

## 5. Current challenges and opportunities for change

The Council faces a number of challenges enhanced by the Covid-19 pandemic, whilst they may be a challenge they also present us with an opportunity to change the way we do things.

### Financial

The Council is facing a significant financial challenge with reduced grants from central government and significant reductions in income as a result of the Covid-19 Pandemic. In the past the Council has been able to use reserves to support the budget gap, this is no longer possible, and savings need to be made in order to deliver a balanced and sustainable budget for the future. This means we need to find more efficient ways to do things, utilising our resources in the most effective ways.

### Technology

As an organisation we must harness the opportunity that digital technology provides us. Technology is advancing at a significant pace, providing exciting opportunities to streamline the ways we work and enabling customers to self-service at a time and place that meets their needs.

The adoption of new technology such as Zoom and online shopping over the course of the pandemic has shown how customers behaviours and attitudes can change significantly in a short space of time. A report by McKinsey has shown that customers appetite and ability for transacting online has jumped 5 years over the period of less than 12 months, creating a unique environment to maximise the opportunities created by this speed of change.

Artificial intelligence (AI) is increasingly entering people's homes and now provides a new channel to access services. With Voice Recognition technology becoming part of people everyday lives.

Robotic Process Automation (RPA) provides additional opportunities to free up our employees from repetitive tasks to focus on customer value adding activities by routing and manage customer requests and transactional services, improving accuracy and reducing costs.

### Data and processes

As a local authority, we sit in the middle of a web of information. The range and diversity of our services generates a huge quantity of data held about our customers and across a variety of back-office systems. Understanding our data is

hugely beneficial in helping us to; make services more targeted and effective, allocate resources to where we can have the biggest impact; save officer time in front and back-office processes, as well as providing insight into the cause of and solutions to costly social problems.

We must consider ways to utilise this untapped information source when redesigning and developing our processes to delivery to attract the outlined benefits.

## **Customer needs**

Over the past 18 months we have seen a significant change in both customer needs and behaviours. We have been able to identify with greater clarity those customer groups who have more specific support needs compared to other customer groups that are more able and confident to self-serve in a digital way. As a result, we now need to review our current customer service delivery models to reflect change in both customer needs and behaviours and changes to our working methods to maximise these opportunities whilst ensuring that all customers can access our services in a way that meets their needs.

## 6. Corporate Strategies – the golden thread

*‘Charnwood is a borough for innovation and growth, delivering high-quality living in urban and rural settings, with a range of jobs and services to suit all skills and abilities and meet the needs of our diverse community.’*

Our Corporate Strategy outlines our four priorities that are central to achieving our vision:

1. **Caring for the environment** – We care deeply about the environment and we are committed to looking after it for future generations
2. **Healthy communities** – We will continue to work with partners to make our towns and villages safer places to live, work and visit
3. **A thriving economy** – We will continue to support and foster strong economic growth in Charnwood
4. **Your Council** – We will continue to improve customer service and develop our staff to help them to deliver outstanding services

Underpinning these priorities are our three values:

**Pride in Charnwood** – We take pride in our work and our borough and are ambitious for the future

**Customer Focused** – We listen to our customers and are focused on delivering excellent services

**Working Together** – We work together with pace and positivity as one council and in partnership with other

The development of Customer Service Strategy will support the Council to achieve its aims under each of these priorities, from becoming a carbon neutral organisation by 2030 helping tackle climate change to building our digital services using technology that will help us be more effective, efficient and flexible to meet customers’ needs.

We recognise there are financial challenges ahead for local government and we will use them as an opportunity to transform into a more efficient, effective, and innovative organisation.

We will use a variety of technology to support current and future collaborations with partners, in both the public and private sector, to bring improvements to our services and the borough of Charnwood.

## Strategic Direction (2020-2024)

The Strategic Direction document accompanies the Corporate Strategy 2020-24 and sets out the key operating principles the Council will adopt to achieve its objectives and deliver outstanding services for residents. It identifies the Council's ambition to be one of the most effective, efficient, and influential Councils in the Country

The document also sets out challenges to be addressed in the delivery of the Corporate Strategy including the COVID 19 pandemic, a reduction in funding and increasing costs, increasing demand for council services, climate change and rapid changes in technology

The document identifies how the Council will operate in a number of key areas. The two areas that are most relevant to the Customer Service Strategy are.

### 1. Customer service

We will:

- maintain a focus on customer experience and put the customer at the centre of our thinking
- increase the number of online services so customers can access them 24/7
- use customer insight and feedback to improve and deliver services
- focus on delivering high customer satisfaction levels

### 2. Transformation and efficiency

We will:

- invest in transformation to achieve measurable outcomes such as service delivery and/or savings
- review all services to make them more efficient and effective
- work with partners to deliver innovative solutions to challenges and opportunities by aligning and integrating services
- maximise the use of technology to make the Council a more streamlined, efficient, and effective organisation

## ICT Strategy (2021 – 2024)

The ICT Strategy sets out the Council's approach to how through the use of technology the organisation will meet its corporate objectives.

The aims of the strategy are:

1. Enabling digital services, transformation and supporting business systems – through channel shift, automation, online and self-service



2. Working with services and partners to improve ICT processes and technologies
3. Modern architecture enabling efficient ICT operation and supporting the new ways of working
4. Robust security and governance arrangements

Each of these aims will support and enable the objectives of the Customer Service Strategy by providing robust, secure, and modern IT systems that will provide customers with the confidence to interact with the Council through a variety of access channels.

### **People Strategy (2021–2024)**

The People Strategy sets out how the organisation will ensure our people have the right, culture, leadership, training, development, and support in order to deliver the vision of the authority. The aims of the People Strategy has been considered in the development of the Customer Service Strategy to ensure alignment and synergies are recognised and acknowledged ensuring both strategies support the delivery of the Corporate Strategy.

By aligning the Customer Service Strategy to the aims and objectives of our corporate strategies we will create a golden thread tying together all aspects of the Council and creating an environment for success.

## 7. Our Customers

Charnwood Borough Council has over 190,000 residents with a wide and varying range of needs.

1. 17% of our residents are aged 0 to 15
2. 65% are of working age (16-64)
3. Over 18% are aged 65+
4. 18% of working age people are in receipt of benefits
5. Nearly 74% of state pension age people are in receipt of benefits

In our most recent residents survey (2019) customers told us:

- When reporting a problem, eight out of ten (80%) contacted the Council by telephone, half (50%) by email and almost a third (31%) through the website.
- 86% were satisfied with their experience of contacting the council.
- If the Council provided more online services, 71% would use them.

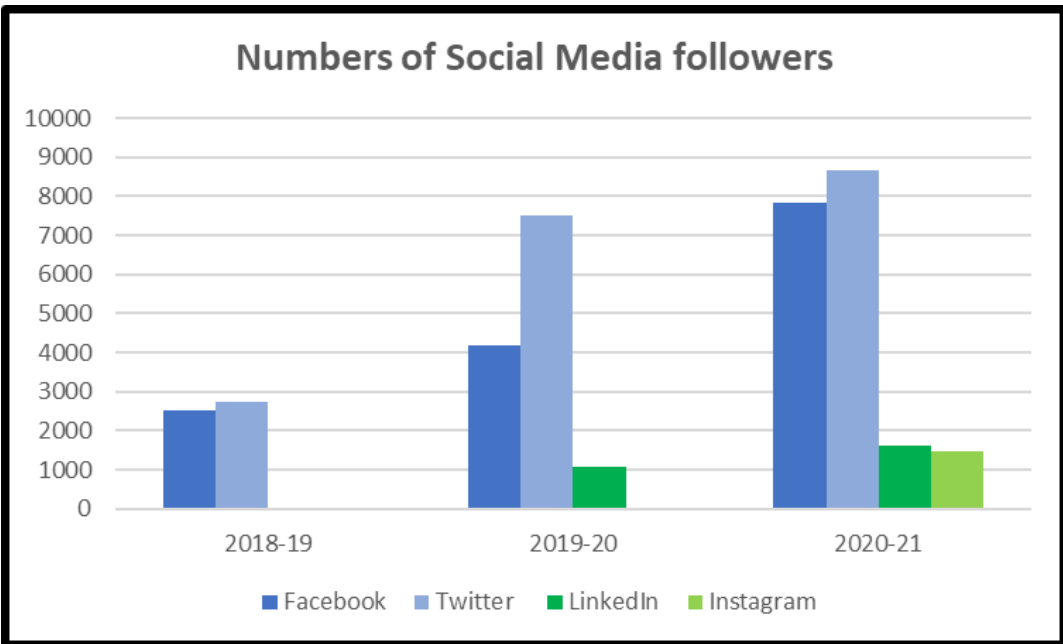
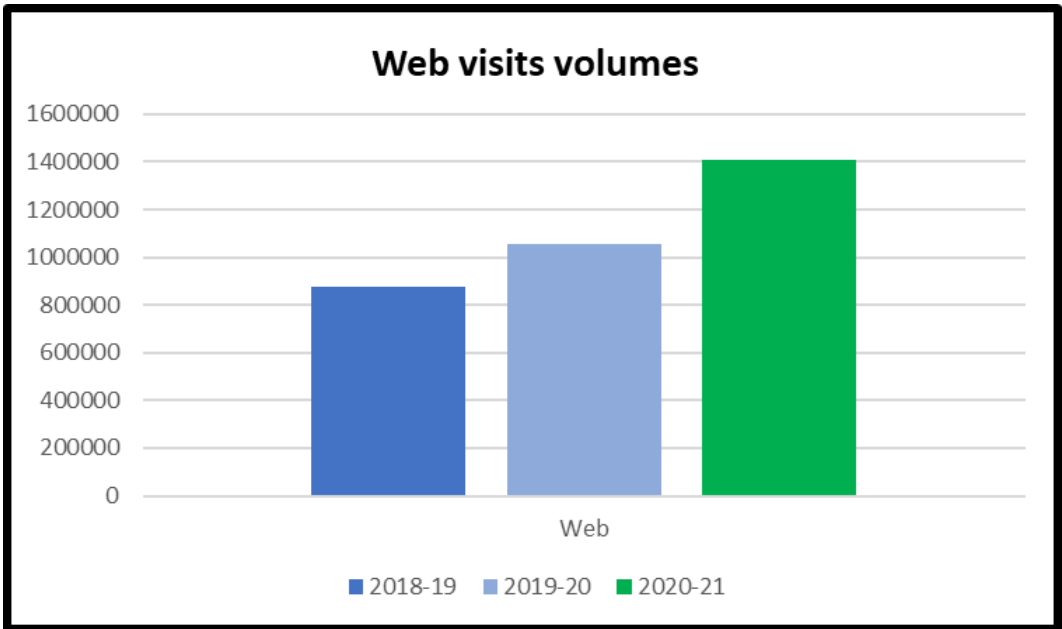
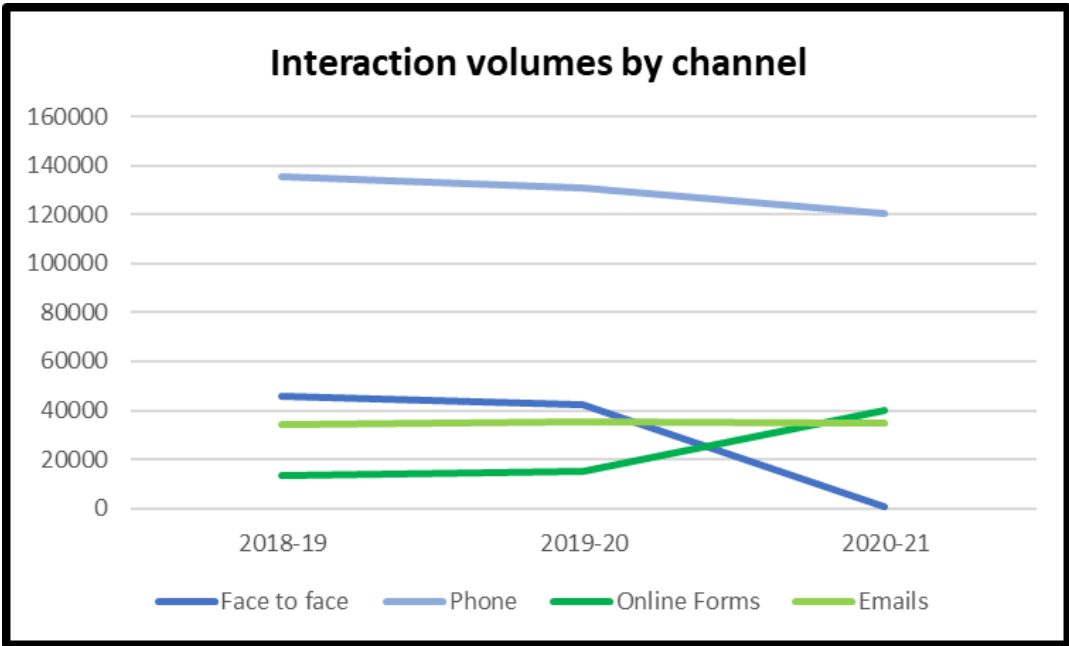
However, due to the Covid-19 pandemic we have seen a significant shift in the way customers are now accessing our services. Although we had seen a steady reduction of customers using the more traditional channels such as face to face and telephone, the restrictions implemented as a result of the pandemic have meant customers have had to use alternative methods to access the services they need.

In 2019/20 Customer Services answered 130,000 calls, served 42,500 visitors to our offices and customers completed 15,200 forms online.

By comparison, in 2020/21, the year of the pandemic, Customer Services answered 120,000 calls (-8%), served only 712 (-98%) visitors to the offices and customers completed 40,000 forms online (+163%).

The diagrams below show a visual representation of:

1. The steady decline in numbers of customers using our phone channel, with a significant reduction in customers using our face-to-face service centre (as a result of the pandemic) and a significant increase in the use of our online forms.
2. A year-on-year increase in customers visiting our website
3. A dramatic increase in followers to our social media channels as well as the introduction of new channels



With the average cost of customer interactions (based on SOCITM data) as follows:

- Face to face interactions - £8.62
- Telephone interactions - £2.83
- Digital (online) interactions - £0.15

The migration to more digital and self-service channels present a sizeable opportunity to increase the accessibility of our services whilst creating efficiencies.

With a significant uptake in digital and online services it would be easy to make the assumption that all of our residents can access our services in this way. However, a digital skills gap analysis was recently undertaken for the Borough which highlighted the following issues:

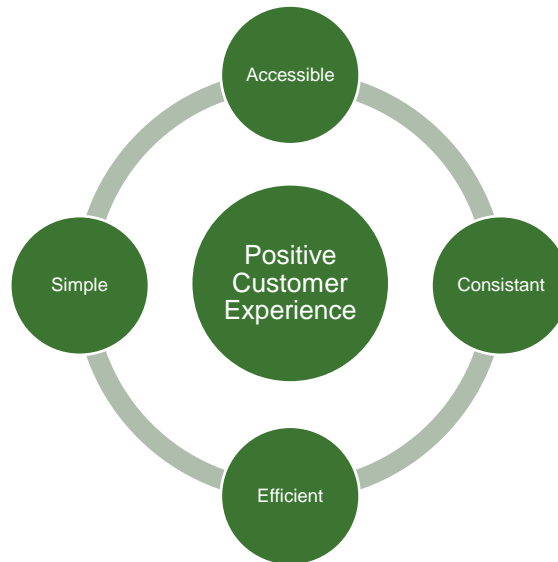
- **20%** of adults in Charnwood have no laptop
- **8.5%** have no internet access at home
- **13,000** (8.8%) of residents of completely offline (11,000 of these are 65+)
- **10%** only use a smartphone to go online
- **21%** don't have the essential digital skills for life
- **12%** have no foundation digital skills

Furthermore, the report highlighted a number of areas within the Borough that are at a risk of digital exclusion. Motivating digitally excluded customers to engage with the digital world can be difficult. To do this successfully requires compelling 'hooks' for each person, and each organisation. Simply 'selling' or presenting a new digital service or technology does not create digital journeys. People and organisations need to understand what is beneficial for them and what an improved life or service might feel like in a digital world. Understanding people's motivations will be key.

## 8. Our aims, principles, and objectives

### Aims

The aim of our strategy is quite simple, we will place our customers at the heart of everything we do, to make every interaction a positive experience: accessible, consistent, efficient, and simple.



### Principles

The strategy draws upon the following principles and themes in its design:

**Customer First:** Placing customers at the heart of the organisation. Empowering our staff to provide their very best customer experience.

**Customer Access:** A modern, fresh approach to customer experience and spaces, whether physical or digital. Light, clean and welcoming environments.

**Digital by Default:** Digital experiences so good that they are the channel of choice.

**Inclusion:** Recognising our customers' unique circumstances and in doing so ensuring that those that need our services are not excluded.

**Customer Insight:** Establishing our data sources and consistently measuring our customer experiences. Knowing our customers and their needs. Understanding why things go wrong and learning from this to improve our services.

**Value for Money, Efficiency and Return on Investment:** Recognising the financial climate, benefit focused outcomes, business minded decision making.

## Objectives

### Putting our customers, the heart of what we do

By putting customer at the heart of what we do we will create a consistent positive customer experience delivering services that meet their needs. We will include our customer when redesigning our services, looking through the lens of our customer to ensure the design meets their needs.

To achieve this, we will:

- ❖ Redesign our processes from end to end, reducing the number of times we transfer customers between teams and focussing on resolving issues at first point of contact

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- ❖ Identify appropriate channels for service delivery – while the majority of customers will be encouraged to access services online, we will provide alternative channels for those who need additional channels (e.g. face to face appointments)

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- ❖ Increase self-service and automate first (where appropriate)

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- ❖ Ensure customers are involved in the development of our services and the redesign process

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- ❖ Use the data we hold about our customers to inform the way we improve processes and deliver our services

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- ❖ Improve the efficiency of our services which will ultimately reduce costs and increase quality

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- ❖ Ensure services are inclusive and respond to equality needs

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- ❖ Enable customers to give feedback on processes and services

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- ❖ Eliminate paper where possible responding to our responsibilities under the Green Agenda

### Digital Inclusion

As more and more services are made available online we must ensure that those customers who have limited digital skills and access to technology are supported and encouraged to develop their skills to take advantage of the numerous benefits associated with being online.

We recognise that addressing the digital skills gap is not the responsibility of one organisation, we will look to work with local and national organisations to play our part in improving the lives of our customers.

To do this we will:

- ❖ Work with partners to create a Digital Inclusion Network, to identify organisations that offer support, skills training, and equipment

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- ❖ Increase the number of Digital Champions (DCs) across the borough, providing more opportunities for people to access digital support

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- ❖ Create and embed a Charnwood 'Triage and Signposting System' to help identifying customer needs and signpost them to the most appropriate support

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- ❖ Target the wards with the highest risk of digital exclusion, looking for opportunities to raise the skills levels in these areas

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- ❖ Centralise all information about digital skills in the District in one place, such as CBC Website, making it easier for people to find what they need

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- ❖ Our employees will support our customers to self-service in the first instance to help develop their knowledge, skills and confidence in accessing services in digital ways

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- ❖ We will offer free access to our Wi-Fi network when on Council premises and will continue to offer free access to our public access computers in our Customer Service Centre

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- ❖ We recognise that not all customers will be able to use our digital services and for those customers we will continue to offer telephone and face to face services

## Harnessing digital technology

Harnessing the power of digital technology will enable the Council to increase accessibility and flexibility for our customers, delivering efficient and effective low costs services whilst freeing up our resources to support those customers with more specific needs

To do this we will:

- ❖ Make online channels convenient and easy to use so that customers choose this as their preferred method of contact with us

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- ❖ Design all online forms to enable system integration and automation

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- ❖ Utilise new technology such as artificial intelligence to deliver services in a more efficient way

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- ❖ Develop and increase the use of webchat and social media channels

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- ❖ Use telephone for supported and complex transactions only, phasing out the use for low need and simple transactions

- 
- ❖ Investigate the use of voice recognition to help customers find services more quickly
- 
- ❖ Provide face to face service only where needed to meet complex and specific customer needs
- 
- ❖ Implement a modern and efficient relationship management system which supports customers to self-serve and manage their transactions online
- 
- ❖ Review our current website with a view of improving the mobile accessibility and useability through new technology

## Involving the whole organisation

Customer Service goes far beyond the Customer Services Team, as an organisation we recognise that every employee and stakeholder has a part to play in delivering a positive customer experience. Every phone call, email, and face to face interaction provides the ability to shape the perception of the Council and what it is trying to achieve.

To do this we will:

- ❖ Use our customer satisfaction results and complaints feedback to develop and improve our services, sharing learning and development with all employees
- 
- ❖ Introduce an organisation wide approach to collecting customer satisfaction through the use of a single satisfaction question
- 
- ❖ Embed our Customer Promise across the organisation to provide a consistent experience for all customers
- 
- ❖ Ensure employees have access to appropriate support and training to provide them with the tools and skills to deliver positive customer experiences



## 9. Our journey

This strategy will be delivered over the next 3 years. The diagram below sets out an indicative but ambitious approach to delivering the Customer Service Strategy. Each element of the journey needs to be assessed individually to ensure it is responsive to the fast-changing environment of the digital world and our customer expectations.

### Year 1

- Phase 1 - Service and process redesign – rolling transformation programme
- Continued development of online forms
- Review option for to replace current CRM system and online forms
- Review options for the replacement of our current website
- Review options to replace current telephony system including options for voice recognition, and web chat
- Investigate use of robotic process automation and artificial intelligence
- Create a Customer focus/feedback group to inform service design and development
- Work with partners to create a digital inclusion network
- Centralise all information about digital skills in the District in one place
- Embed the Customer Promise across the organisation



### Year 2

- Phase 2 - Service and process redesign – rolling transformation programme
- More automation of online forms
- Replace current CRM system and online forms
- Replace current telephony system
- Robotic process automation proof of concept
- Target the wards with the highest risk of digital exclusion
- Create and embed a Charnwood 'Triage and Signposting System'
- Design and implement an ongoing communication campaign promoting the use of digital
- Implement the 'one question' approach to customer satisfaction
- Customer Experience and digital skills training all staff



### Year 3

- Phase 3 - Service and process redesign – rolling transformation programme
- More automation of online forms
- Increase the number of Digital Champions (DCs) across the borough
- Review options to replace current website
- Artificial intelligence proof of concept
- Development and implementation robotic process automation tools
- Using customer complaint data and satisfaction results, implement learning and development sessions for all staff





# Equality Impact Assessment

**Customer Service Strategy  
2022-2025**

- **Background**

An Equality Impact Assessment is an improvement tool. It will assist you in ensuring that you have thought about the needs and impacts of your service/policy/function in relation to the protected characteristics. It enables a systematic approach to identifying and recording gaps and actions.

- **Legislation- Equality Duty**

As a local authority that provides services to the public, Charnwood Borough Council has a legal responsibility to ensure that we can demonstrate having paid due regard to the need to

- ✓ Eliminate discrimination, harassment, victimisation.
- ✓ Advance Equality of Opportunity
- ✓ Foster good relations

**For the following protected characteristics:**

- ✓ Age
- ✓ Disability
- ✓ Gender reassignment
- ✓ Marriage and civil partnership
- ✓ Pregnancy and maternity
- ✓ Race
- ✓ Religion or belief
- ✓ Sex (Gender)
- ✓ Sexual orientation

**What is prohibited?**

- ✓ Direct Discrimination
- ✓ Indirect Discrimination
- ✓ Harassment
- ✓ Victimisation
- ✓ Discrimination by association
- ✓ Discrimination by perception
- ✓ Pregnancy and maternity discrimination
- ✓ Discrimination arising from disability
- ✓ Failing to make reasonable adjustments

**Complete this action plan as you go through the questions**

- **Step 1 – Introductory information**

Title of the policy	<b>Customer Service Strategy 2022-2025</b>
Lead officer and others undertaking this assessment	<b>Karey Barnshaw</b>
Date EIA started	<b>23<sup>rd</sup> August 2021</b>
Date EIA completed	<b>24<sup>th</sup> August 2021</b>

- **Step 2 – Overview of policy/function being assessed**

Outline: What is the purpose of this policy? (Specify aims and objectives)

Charnwood Borough Council is transforming the way that it interacts with its customers. This strategy provides the vision and principles for this transformation and in doing so, outlines our ambition and appetite to meet our customers' needs.

This strategy sets out our vision to achieve the best possible experience for our customer, whoever they are (residents, businesses, partners, or suppliers) and whenever they deal with us.

What specific group/s is the policy designed to affect/impact and what is the intended change or outcome for them?

The Strategy could impact on all customers who contact the Council. The aim of the strategy is to place our customers at the heart of everything we do, to make every interaction a positive experience: accessible, consistent, efficient, and simple.

Which groups have been consulted as part the of creation or review of the policy?

Previous residents surveys, a digital skills gap analysis and customer insight data has all been used to inform the strategy. In addition, customer comments/feedback, contact data and statistics have also been utilised. No specific groups have been consulted on as part of the development of the strategy.

- **Step 3 – What we already know and where there are gaps**

List any existing information/data do you have/monitor about different diverse groups in relation to this policy? Such as in relation to age, disability, gender reassignment, marriage and civil partnership, pregnancy & maternity, race, religion or belief, sex, sexual orientation etc.

Data/information such as:

- Consultation
- Previous Equality Impact Assessments
- Demographic information
- Anecdotal and other evidence

Digital Skills Gap Analysis report completed by Citizen Online which identifies digital skills gaps by age and location

All other data and information are not specific to the groups listed

Previous outcomes in Resident Survey's (specify year if known)

Census Data (has this been used during the process, if so, I would reference it here)

What does this information / data tell you about diverse group? If you do not hold or have access to any data/information on diverse groups, what do you need to begin collating / monitoring? (Please list)

The digital skills gap analysis provides a breakdown by age groups and locations where there is likely to be a higher risk of digital exclusion. This information has been used to create an action plan to address the high-risk areas and recommendations from the report.

- **Step 4 – Do we need to seek the views of others? If so, who?**

Considering the answers given in Step 2, do you need to consult with specific groups to identify needs / issues? If not explain why.

It is not felt that view of specific groups is needed to be consulted with on this strategy. The Strategy sets out an approach that commits to involving customers where appropriate/possible in the future development of new services to ensure that customers have the opportunity to inform the development of new services. The Strategy does not seek to withdraw any services from customers, instead it looks to increase the services that are available online for those customers than can and want to use this method but always retain services via other channels such as face to face to support those customers who need to use these channels.

● **Step 5 – Assessing the impact**

<p>Considering any data/consultation/information and your own knowledge, identify whether the policy has a positive or negative impact on the individuals or community groups who identify with any 'protected characteristics' and provide an explanation for your decision. Please refer to the general duties on the front page.</p>	
Age	<p>Positive – the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use</p>
<p>Disability</p> <ul style="list-style-type: none"> <li>• Physical</li> <li>• Visual</li> <li>• Hearing</li> <li>• learning disabilities</li> <li>• mental health</li> </ul>	<p>Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use</p>
Gender Reassignment (Transgender)	<p>Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use</p> <p>Potential barrier to access relevant information due to limited local information on gender reassignment of Borough demographics</p>
Race	<p>Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use</p>

	Language may constitute a barrier however the strategy will be available in different languages as required
Religion or Belief (Includes no belief)	Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use
Sex (Gender)	Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use  Potential barrier to access relevant information due to limited local information on sexual orientation of Borough demographics
Sexual Orientation	Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use
Other protected groups <ul style="list-style-type: none"> <li>• Pregnancy &amp; maternity</li> <li>• Marriage &amp; civil partnership</li> </ul>	Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use
Other socially excluded groups <ul style="list-style-type: none"> <li>• Carers</li> <li>• Low literacy</li> <li>• Priority neighbourhoods</li> <li>• Health inequalities</li> <li>• Rural isolation</li> <li>• Asylum seeker and refugee communities</li> </ul>	Positive - the strategy recognises that different customers' needs may have an impact on the way customers can/want/need to access our services and ensures this is considered and that there is choice and support for customers regardless of the channel they use

Where there are potential barriers, negative impacts identified and/ or barriers or impacts are unknown, please outline how you propose to minimise all negative impact or discrimination.

- If you have identified adverse impact or discrimination that is illegal, you are required to take action to remedy this immediately.
- Additionally, if you have identified adverse impact that is justifiable or legitimate, you will need to consider what actions can be taken to mitigate its effect on those groups of people.

The strategy recognises that different customers' needs may have an impact on the way they can/want/need to access our services and ensures this is considered to minimise any negative impact by providing choice and support for customers regardless of the access channel they use.

Effective monitoring of all protected characteristics will be vital to ensure any potential barriers are removed at the earliest opportunity.

Summarise your findings and give an overview as to whether the policy will meet Charnwood Borough Council's responsibilities in relation to equality and diversity (please refer to the general duties on the front page).

The Customer Services Strategy includes the following principles:

**Customer First:** Placing customers at the heart of the organisation. Empowering our staff to provide their very best customer experience.

**Customer Access:** A modern, fresh approach to customer experience and spaces, whether physical or digital. Light, clean and welcoming environments.

**Digital by Default:** Digital experiences so good that they are the channel of choice.

**Inclusion:** Recognising our customers' unique circumstances and in doing so ensuring that those that need our services are not excluded.

**Customer Insight:** Establishing our data sources and consistently measuring our customer experiences. Knowing our customers and their needs. Understanding why things go wrong and learning from this to improve our services.

**Value for Money, Efficiency and Return on Investment:** Recognising the financial climate, benefit focused outcomes, business minded decision making.

These principles will ensure that the Strategy will meet the Council's responsibilities in relation to equality and diversity.

● **Step 6- Monitoring, evaluation, review**

Are there processes in place to review the findings of this Assessment and make appropriate changes? How will you monitor potential barriers and any positive/ negative impact?

The delivery of the overall strategy will be monitored by the SWaP board, any individual project arising from the strategy will require a separate EIA to ensure that the changes meet the required standards.

How will the recommendations of this assessment be built into wider planning and review processes? e.g. policy reviews, annual plans and use of performance management systems.

There are no specific recommendations from this assessment.

● **Step 7- Action Plan**

Please include any identified concerns/actions/issues in this action plan. The issues identified should inform your Service Plan and, if appropriate, your Consultation Plan

Reference Number	Action	Responsible Officer	Target Date
001	Delivery of the overall strategy will be monitored by the SWaP board	Karey Barnshaw / SWaP Board	2022-2025
002	Continue to monitor individual feedback and/or satisfaction levels to ensure no groups are adversely impacted	Karey Barnshaw	2022-2025



- **Step 8- Who needs to know about the outcomes of this assessment and how will they be informed?**

	Who needs to know?	How they will be informed (we have a legal duty to publish EIA's)
Employees	All employees	Through One Charnwood, Team meetings and regular updates
Service users	All customers	The strategy will be published on our website and available in hard copy on request. The Strategy will also be approved by full Council with the meeting being accessible by members of the public
Partners and stakeholders	Members	The Strategy will be approved by full Council, provision the opportunity for all member to be made aware of the strategy
Others	N/A	
To ensure ease of access, what other communication needs/concerns are there?	N/A	

- **Step 9- Conclusion (to be completed and signed by the **Service Head**)**

Delete as appropriate
<b>I agree with this assessment</b>
If <i>disagree</i> , state action/s required, reasons and details of who is to carry them out with timescales below.
Signed (Service Head): Karey Barnshaw
Date: 23 <sup>rd</sup> Aug 2021

Please send completed & signed assessment to **Vicky Brackenbury** for publishing.