

Scrutiny Review – Scoping Document

Review Title:	Customer Journey
Scrutiny Board:	Budget and Corporate Scrutiny Management Board
Date of Review:	February 2023

Reasons for undertaking the review:

On Wednesday, 13 July 2022, the Budget and Corporate Scrutiny Management Board agreed to investigate the “Customer Journey” undertaken by Sandwell residents when accessing Council services.

The Membership of the Working will be agreed by the Board and a subsequent project plan will be completed for this review.

Key Lines of Enquiry identified:

- a) How people access Council services (Digital/Physical/Telephone)
- b) Contact Centre procedures and customer service best practice
- c) Customer Portal efficiency

Intended Outcomes:

To help identify, if deemed necessary, any outstanding issues with the Councils customer-focused services. Potential recommendations should be considered best practice and in line with Sandwell’s Vision 2030:

- To understand if Sandwell residents can obtain the assistance they require in an efficient but timely manner
- To identify if there is a need for alternating approaches to customer service when considering residents with varying circumstances e.g. residents without internet access/disabilities
- To investigate the customer journey process and how residents are accessing Council services (physical, digital or via telephone)
- To assess if the Council is providing a welcoming, friendly, and helpful service with accurate and timely advice
- To consider if the Customer Portal is efficient and effective at delivering it’s aims and objectives

- To identify if the Councillor Portal is fit for purpose

**Officer Group
(including partners):**

**Links to Corporate Plan
and Vision 2030:**

One Council, One Team

Ambition 3: Our workforce and young people are skilled and talented, geared up to respond to changing business needs and to win rewarding jobs in a growing economy.

Ambition 5: Our communities are built on mutual respect and taking care of each other, supported by all the agencies that ensure we feel safe and protected in our homes and local neighbourhoods.

Ambition 10: Sandwell now has a national reputation for getting things done, where all local partners are focused on what really matters in people's lives and communities.

**Scoping undertaken
by:**

Budget and Corporate Scrutiny Management Board

**Council Chief Officer
(or partner equivalent):**

Neil Cox – Director Business Strategy and Change
Other Chief Officers as applicable.

Existing data available for consideration:

Resident feedback survey
Customer service logs
Sandwell Council complaints team

Potential witnesses

Council Officers
Councillors
Sandwell residents
LGA
Other Local Authorities
Customer Service training providers
Trade Unions

Activities

Desk top research
Survey(s)
Focus group(s)
Meetings
Contact Centre site visit

	“Mystery Customer” visits/requests
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Review Work Programme:			
Task	Method	Lead person(s)	Completion by:
Briefing paper setting out an overview of the current customer journey (how people contact us, how we interact and our standard replies)	Report(s) to working group meeting	Neil Cox	February 2023
Performance information which tells us how we are doing, look at observations & feedback received (KPIs/feedback from residents surveys) Outline of themes and trends on complaints	Report to working group meeting	Neil Cox	February 2023
Gather evidence from residents/staff/trade unions on experience of interaction with the Council	Working Group Site visits/speak to witnesses	Democratic Services	February 2023