

Budget and Corporate  
Scrutiny Management Board  
**Customer Journey Scrutiny  
Review**

**Providing a “critical friend” challenge**

**Addressing the concerns of the public**

**Member-led scrutiny**

**Driving Improvement**

**Adding value and demonstrating  
effectiveness**

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## Chair's foreword

Local government is responsible for providing a range of vital services for people and businesses. Providing excellent customer service should be the aim for every local authority with responsibility for this sitting with every employee whatever their role.



Our review has found that too often customer service at Sandwell Council is still not at the level that is expected. This was not a surprise to our Scrutiny Committee, as it had already been recognised as an area of weakness through the government's intervention in the authority.

Improving customer service is also a key part of the Improvement Plan and a central area of focus for the Commissioners.

Despite much of the positive work that has taken place in recent months, including investment in new systems, our review found that there is still too often a disconnect between the first point of contact and then the action subsequently taken to resolve a query for people and businesses.

Moreover, there are still too many examples of enquiries not being responded to in a timely manner, or with a substantive reply which answers what was asked.

One of the most surprising things we found was a lack of corporate training in customer service skills for all employees, with this being left to individual departments. In some cases, there was no such training available to staff at all and it meant a lack of clarity about how we define excellence in customer service.

In addition, we found there had been too much of a corporate focus on trying to 'fix' issues at the contact centres when a significant proportion of the customer service issues actually occur after the initial point of contact and what happens next.

Our review has made a series of recommendations which we hope will stimulate debate about how customer service can be improved at Sandwell Council.

### Councillor Paul Moore

#### Chair – Budget and Corporate Scrutiny Management Board



# Introduction and Background

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On 22 March 2022, the Secretary of State for Levelling Up, Housing and Communities announced an intervention package and a set of Directions to ensure the council was able to comply with its best value duty under Part 1 of the Local Government Act 1999. These Directions were in-part influenced by the Grant Thornton report following their Value for Money Governance Review of December 2021.

The Government's intervention package requires the preparation and agreement of an Improvement Plan that will:

- deliver rapid and sustainable improvements in governance, leadership and culture in the council;
- secure improvement in relation to the proper functioning of the scrutiny and associated audit functions; and
- secure continuous improvement in all services.

In response, the Council developed an Improvement Plan which included proposed mechanisms for governance and assurance.

One of the objectives within the Plan is to improve the customer journey experience to meet residents needs and demands. This is a corporate priority for the authority.

In 2022, the Budget and Corporate Scrutiny Management Board agreed to investigate the experience of Sandwell residents when accessing or requesting Council services, to be referred to as the "Customer Journey". This was in response to:-

- concerns raised by residents about response times to queries
- member's experiences when trying to contact services/individual officers (e.g. delayed/no response).
- addressing the objectives of the Council's Improvement Plan to improve the customer journey experience
- to improve communication between residents and the council.



The Board recognises that significant improvements need to be made in order to help the Council to come out of intervention. Customer services is of public interest and aligned with the Council's corporate priorities.

A scoping document was created which carried out the rationale and provided suggestions of ways forward for the review to progress. Several lines of inquiry were identified for the review alongside a range of methods that could be used to gather evidence including the utilisation of Council surveys, desktop research, meetings with key stakeholders and site visits. As part of the Council's Improvement Plan, the Council was seeking to embed values and behaviours as a foundation of the council's workforce strategy. The work of the review would therefore complement ongoing work to address the recommendations set out in the Improvement Plan.

### Scope

The Board approved the scope for the review ([Appendix A](#)) at its meeting on 12 January 2023.

### Aims and Intended Outcomes

To review and to identify, if deemed necessary, any outstanding issues with the Council's customer-focused services. Potential recommendations needed to be considered best practice and be in line with Sandwell's Vision 2030:

- to address the outcomes from the Improvement Plan relating to the customer journey experience and ensure it meets the needs and demands of our residents;
- 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.

### Lead Officers:

The Group was supported primarily by the following officers:

Suky Suthi-Nagra

Dawn Winter

Anthony Lloyd

Debbie Cross

Helen Green

Jason Copp

Collette Knight

Andy Langford

Sean Russell

Nigel Collumbell

Tracey Causer

Sharon Lang

Vicky Merritt

Lauren Pilkington

## **Membership**

Councillor Paul Moore (Chair)

Councillor Ellen Fenton

Councillor Elaine Giles

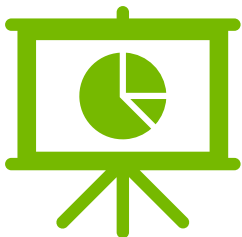
# Methodology

During its investigation, the working group held two half day sessions to obtain information on the current and proposed “customer journey”. Officers from various departments across the organisation were invited to provide their experiences to the group. Recommendations were formed as a result of this detailed analysis based on the concerns, insights and issues expressed by those who attended.



Frequent working group meetings to guide and steer the Scrutiny Review

Detailed analysis into Sandwell Council’s Resident Survey to better understand public perception regarding Customer Service



Performance data review and feedback session with contact centre officers

Site visits carried out by members to the Council’s Corporate Contact Centre and One Stop Shop



# Recommendations and Findings

## Recommendation 1.1

**That the Director of Regeneration and Growth/Assistant Chief Executive, in consultation with the Cabinet Member for Finance and Resources and Cabinet Member for Adult Social Care, be authorised to agree customer care standards/charter, and staff responsibilities in relation to those standards to ensure;**

- a) that “back-office” staff take ownership and accountability of customer requests received via Contact Centre Agents;**
- b) a standard approach is taken to making officer contact numbers available on Outlook and to customers to prevent additional calls being made to the Contact Centre;**
- c) a standard approach to the complaints process and deadlines for responding to complaints are clear and accessible across all Council services;**
- d) that key contacts are identified within each service area to aid Customer Service Agents in their enquiries;**
- e) that residents are regularly updated and informed about the current process of their request/query.**

Throughout the review, the working group was impressed with the professionalism, breadth of knowledge and commitment shown by the Contact Centre and One Stop Shop staff in delivering excellent customer service to the residents and businesses that the council serves. This was best demonstrated when Councillors spent time working alongside Customer Services Officers in the Call Centre and visiting the One Stop Shop. Staff were currently responding to queries from 13 different service areas so had to be retain knowledge on those areas. More complex queries for e.g. council tax or revenues and benefits would be dealt with by the specialised Revenues and Benefits Team.

### **Corporate standards**

During their observations, the working group noted that there were currently different approaches to dealing with customers across the Council and no one single corporate standard, e.g. a number of service areas would not respond to customer queries within the allocated timeframes.

During their observation of the One Stop Shop, one customer had come into the Council House five times to ask about single occupancy discount.

Following conversations with officers, there had been repeated examples of people waiting too long or visiting the Council House for the same query because their issues had not been resolved the first time they had contacted the Council. In some cases, this included people at risk. Too often, it was felt the Council was not getting things done the first time.



Since the pandemic, more staff were working from home, however expectations of some customers are that they can come to the Council House and speak directly to department specialists. However, this is no longer the case. A significant number of the workforce continue to work from home with a small number of officers coming into the building as and when needed. Whilst services had successfully operated remotely during the pandemic, there appeared to be a perception that this would continue with officers not required to come into the building, however, customers footfall had since increased and now they expected a face-to-face service, which was not currently in place. In addition, the cost of living crisis, energy rebate schemes and other pressures on residents had resulted in more customers coming through the door.

In order to ensure consistency within the Council, it was proposed that customer service standards/charter should be developed to include the Council's aims and expectations as well as stating how and what will be measured to ensure compliance. It should set customer service standards that are applicable across services and to each council officer to ensure consistency, including response times. The charter would be a document for customers so that it could be easy to understand and be as user-friendly as possible as well as setting out expectations.

### **Communications between Customers, Contact Centre Agents and “back-office” staff**

Following discussions with Officers and visits to the Council's Corporate Contact Centre and One Stop Shop, the working group quickly identified concerns regarding the break-down of communication between Contact Centre Advisors and “back-office” staff. For this report, “back-office” staff will be defined as Council employees who are not typically “customer facing” in their day-to-day roles. As a result of the pandemic, a number of back-office workers were required to work from home and continue to do so.

In some instances, customer requests remained unanswered by back-office staff despite consistent and repeated attempts by Contact Centre agents to resolve outstanding enquiries. During discussions with back-office staff, these issues were confirmed as legitimate points that were simply down to a lack of resources to both resolve the issue and keep customers informed. This lack of communication would then prompt residents to submit further requests, duplicating cases and increasing work-load. Upon further inspection, it was evident that no single approach or operating procedure was in place to obtain the information required in order to process customer requests with many Contact Centre agents developing their own procedures and preferred contacts when dealing with enquiries. This highlighted the desperate need for a standard operating procedure to be implemented to enable a consistent service across the board. It is therefore recommended that a single point of contact is identified within each service area (or, devolved further if necessary) to establish responsibility and increase the effectiveness of the processing of customer requests.

Members had several anecdotes where residents had missed a “call back” from the service area that had been responsible for their enquiry. In many cases, no further attempts were made to make contact or no direct contact number was left with the customer resulting in customers going back through the contact centre practically duplicating the request, leading to distress and frustration.

As a result, discussions commenced regarding the possibility of providing Council staff work mobile numbers to customers who have on-going cases. However, although this would alleviate pressure on the Contact Centre by potentially reducing the number of “chase” calls, it may result in officers receiving multiple requests that may not be relevant to their service area once the initial request had been resolved. It is suggested that a standard approach should be developed to alleviate the concerns and to establish guidelines for regular communications and updating procedures for customers with outstanding or on-going queries. Customers should be able to consistently, clearly and reliably display the progress of their enquiry or service request and contact should always be made when updates are available. Achieving closure is one of the most important aspects for customers; any cases that remain open for longer than usual periods of time should be reviewed and escalated where appropriate.

It was felt that the Council should set out clearly to customers how it was operating and what they can expect should they decide to visit the Council House via social media and other communication channels. In addition, the Council’s website should be kept up to date with relevant information and made easy to use to enable customers to easily find and complete relevant forms.



# Recommendations and Findings

## Recommendation 1.2, 1.3 and 1.4

- 1.2 That the Director of Regeneration and Growth/Assistant Chief Executive be authorised to commission/develop a customer training package that incorporates the following topics:-**
- a) The completeness of response letters**
  - b) Methods to manage customer expectations and awareness around the Council's remit and responsibilities.**
- 1.3 That the Director of Regeneration and Growth/Assistant Chief Executive ensure that all members of staff undertake training around customer care standards as identified in 1.2 and that staff performance against these standards be incorporated within the appraisal process.**
- 1.4 that mandatory corporate customer service training be included as part of the induction process for all staff.**

### Customer Service Training

The review highlighted several areas where increased awareness of customer service processes and systems could be beneficial.

For example:

- The Customer Charter/service standards.
- Defining contacts and complaints.
- Where to find useful information e.g. website/social media.

The working group felt that newly developed corporate customer service training should be delivered to all staff to help embed customer service standards within all services. It was also felt that mandatory customer training should be included as part of the induction process to help raise awareness of the corporate approach to customer services, service standards and the Councillor's role within this.

### Managing Customer Expectations

In particular, training is required around ensuring staff are well equipped to be able to manage customers' expectations. It is vital that customers are aware on whether or not their request can be met and, if so, what timeframes can be expected. Expectations should be set by Council staff at the earliest possible opportunity so that customers can re-direct their requests elsewhere if necessary.

Developing Council Officers' knowledge on the Council's remit is vital to assist a proficient and effective first point of contact and remove any uncertainty on functions and services that are provided by the Council. The completeness of correspondence was highlighted by members after several anecdotes had been received by customers of insufficient, wrong or badly written responses. Making certain that correspondence is clear, accessible and easy to understand is key to good customer service and would develop and maintain trust between the Council and its customers.



## Recommendation 1.5

**1.5 That the Director of Regeneration and Growth/Assistant Chief Executive, in consultation with the Director of Finance, investigate options for procuring a single joint Customer Relations System across the Council.**

### What is a Customer Relations Management System (CRM system)?

A Customer Relations Management System is the technology used to manage interactions between an organisation and its customers. An effective CRM system will help streamline processes and keep records of customer contact information as well as their preferred communication methods. It can also be used to track and capture previous interactions to better enable officers to identify reoccurring themes or quickly refer to recent enquiries. Customer Service Staff can use the system to effectively track conversations across multiple channels in one common platform. This is also useful as it would allow back-office staff from a wide array of departments to communicate effectively with the contact centre(s) which would increase efficiency in the process overall.

### The current system in place at Sandwell Council

The Sandwell Council contact centre currently utilises Firmstep/DASH as its main CRM system. However, several CRM systems were in use across various departments. Upon further investigation, a total of 13 systems were identified. Although it is understandable that each CRM system contained its own advantages and disadvantages that could be more relevant to one service than another, it was clearly difficult and time-consuming for Contact Centre Officers to co-ordinate effective communications. The numerous avenues also caused difficulties with keeping clear and concise records of customer interactions as information was often spread across the systems in a disjointed manner.

### Proposals and reasoning

Proposals from members included the need for a joint system that would ideally incorporate the existing databases or, at the very least, streamline the systems used. In doing this, officers would have a single point of access to obtain customer information, recent requests and completed cases to better map and review trends.



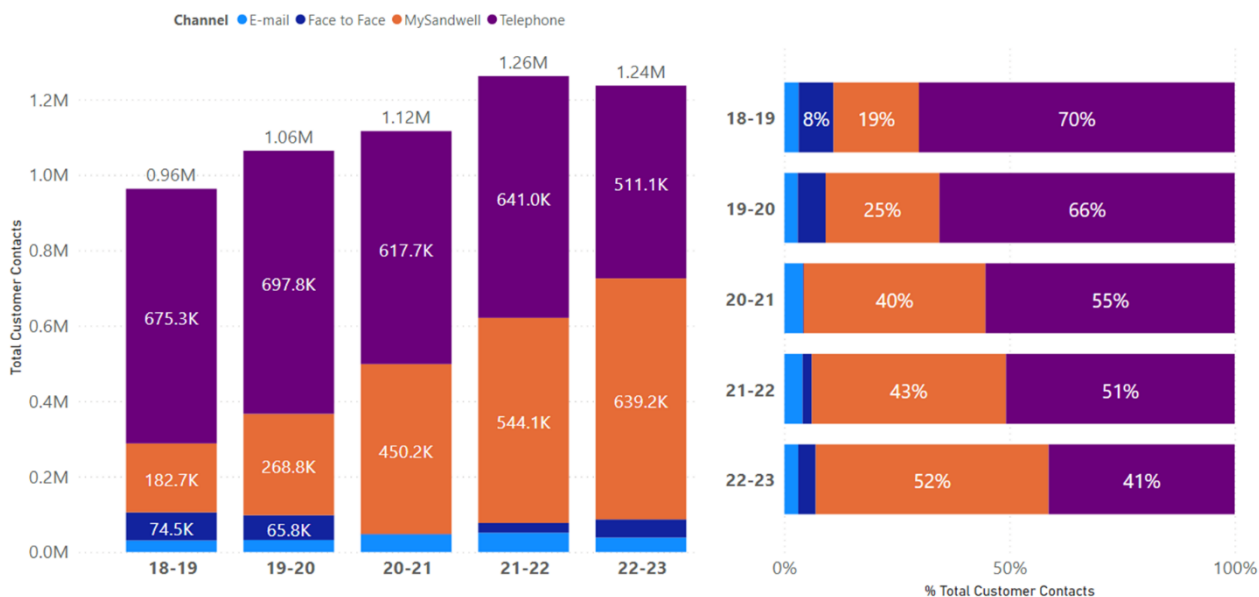
# Recommendations and Findings

## Recommendation 1.6

**1.6 That the Director for Director of Regeneration and Growth/Assistant Chief Executive considers the introduction of automated feedback surveys and that regular feedback on Council enquires/complaints are analysed and shared with Directorates.**

### Current feedback collections methods

Customer feedback is currently collected via the Sandwell Council website (for digital enquires) and spoken questionnaires (for enquiries over the phone). Although the digital enquiries are receiving adequate responses, more effort is required to increase feedback over the phone. Verbal feedback responses by customers to the operator responding to their query could prevent customers from being open and honest about their experience. Sandwell Council's current telephony system is dated and in need of an urgent update; no facility was available to include automatic feedback which greatly reduced the Council's options in doing so. Data, as of February 2023 which can be seen in the diagram below, suggested that phone calls were still a major contributor to the overall customer contact figures. This reaffirms the need to better monitor and collect data.



A new, modern and robust system with the capability to host automatic feedback questionnaires is required to better understand resident perceptions and needs. In failing to do so, the Council misses a key opportunity to use this information to help adapt and create services to meet the needs of the public.

Once the technology is in place, information should then be collated and shared on a regular basis with each directorate to ensure the complete oversight of trends and concerns. This will also help with the allocation of resources.



# Recommendations and Findings

## Recommendation 1.7

- 1.7 That the Director for Director of Regeneration and Growth/Assistant Chief Executive introduces corporate guidelines in relation to the use of Council contact numbers to ensure that all officers are contactable and that contact details are updated regularly.**

### Issues around contacting internal council staff

Although the Council's Contact Centre attempts to answer as many enquiries as possible in the first instance, there are some occasions when this is not always possible and as a result, further communication with back-office staff is required.

Officers highlighted the difficulties they sometimes experienced when contacting back-office staff. The relevant officer details provided were often outdated and, in some instances, the aforementioned officer had left the authority completely. Anecdotes were also provided that detailed scenarios in which urgent matters had arisen but could not be resolved as the responsible officer could not be identified following initial attempts. This is especially problematic when dealing with sensitive and time critical requests that could result in severe consequences for the individual making the request.

The working group also observed that there were too many disparate numbers for customers to navigate around and would on occasion get cut off.

### What should could be done and issues around potential solutions?

It is therefore suggested a corporate approach be taken to ensuring Council staff maintain up-to-date contact details so that internal communications remain as effective as possible. Many organisations and other local authorities have already integrated staff contact numbers into the Microsoft Teams application. Not only does this remove the need for physical telephony equipment, it also enables staff to answer calls made to their contact number through Microsoft Teams. This technology would assist with preventing contact information becoming outdated as any changes to contact numbers should be automatically updated.

Whilst this technology is being implemented, or in the case that this integration is not possible, managers should be proactive in providing front line teams and supervisors with correct and up-to-date information on a regular basis.





# Recommendations and Findings

## Recommendation 1.8

- 1.8 That the Director of Regeneration and Growth/Assistant Chief Executive considers the feasibility of amalgamating the current three contact centres (Corporate Contact Centre, Revenues and Benefits Contact Centre and Adult Social Care Care) into a single contact centre number with staff specialising in various areas.**

### Current and considered approach

Sandwell Council currently operate 3 individual contact centres, each specialising in different subject areas.

The Corporate Contact Centre, the biggest of the three, deals with a wide variety of requests including, but not limited to, housing repairs, registrar queries, grass cutting, overgrown trees, parks, cemeteries and waste enquiries. There was also a contact centre each for both Adults and Revenues and Benefits enquiries respectively.

The benefits and disadvantages of continuing the use of three contact centres were discussed on several occasions. Retaining the centres separately would provide a more specialised approach, allowing officers to develop and retain skillsets relevant to their subject area, however, this only further increases the amount of contact points (and numbers) across services which may seem counterproductive in achieving a single access point for customers.

Combining the contact centres would enable a single contact number for all Council enquiries. It is thought that this would ease the difficulty with navigating the Council's telephony system but training to existing staff in all subject areas would be required. This may be concerning when considering the vast amount of knowledge required in some of these specialist areas, especially when providing advice on Council Tax and Benefit matters. This raises the question of whether staff would be capable of learning and retaining the intricacies of every single topic or if specialist teams would be re-introduced to receive specific enquiries.

This could be achieved by using a singular number that utilises a subject menu to then further delegate the call to the appropriate officer without the need for requiring multiple numbers.



# Recommendations and Findings

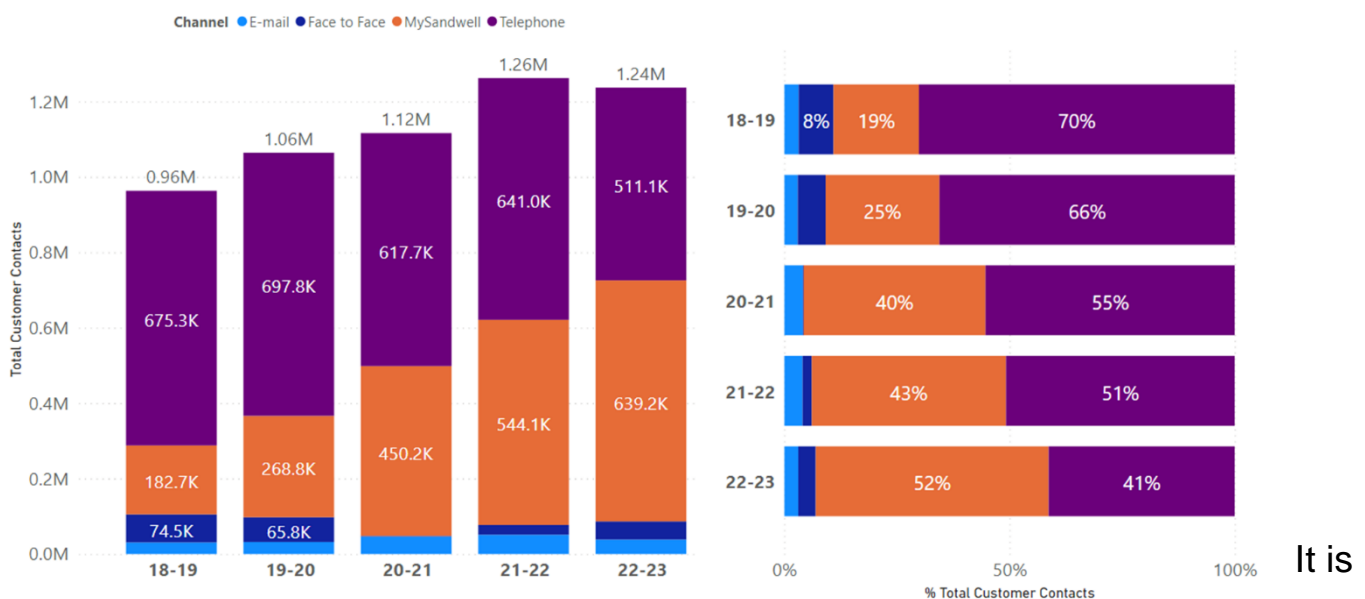
## Recommendation 1.9

**1.9 That the Director of Regeneration and Growth/Assistant Chief Executive, as part of the refresh of the Council’s website, ensures the Council continues to promote the use of Sandwell Digital First and the Council’s website as the first point for accessing information and raising an issue/request.**

### The “Digital First” offer

As a result of the recent pandemic and the shift to staff working from home, the Council was required to drastically change its approach to providing customer service to residents. Subsequent lockdowns and the closing of offices meant that a “digital first” approach was taken to enable residents to raise concerns and requests via the Council’s website.

As seen from the graph below, digital requests now account for the majority of customer requests:



It is therefore important that the Council’s website and online services are accessible, relevant and up-to-date to help assist residents with any enquiries they have in the first instance. Residents without access to digital services should still be offered help through alternative avenues but also encouraged and offered to make use of self-service machines as seen in the one-stop shop.

## The Council's website

The Council's website contains an array of information useful to residents to help them with any enquiries they may have. The website also provides help and guidance for matters concerning Public Health, Finances and Wellbeing. Although useful, members and officers alike had noted the dated look of the site and the many pages that had not been updated for quite some time. It is vital that webpages are relevant and still appropriate and therefore, as a part of the Council website refresh, procedures should be in place to ensure webpages are routinely checked, updated and removed if required. Benchmarking exercises should also take place to detail the approach to website design made by other authorities and whether or not the amount of digital traffic has improved to reflect the changes.

In looking at Digital First, the working group felt that the balance of council resources had been focussed significantly on Digital First and not enough resources for call handling or face to face contact. The working group felt that the use of community hubs utilising libraries more effectively for customer contact should also be considered.



# Recommendations and Findings

## Recommendation 1.10

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**1.10 That as part of the customer journey review being undertaken, the Director of Regeneration and Growth/Assistant Chief Executive reviews current timescales for responding to enquiries and consider a reduction, wherever possible, including member enquiries being reduced from 10 working days to 3-5 days.**

The working group highlighted that the current timescales for responding to enquiries, for both residents and Councillors, was in need of a review and consideration should be given to a reduction. Neighbouring authorities in the surrounding area laid out clear and precise deadlines in which residents should receive a response with some local authorities having service level agreements as little as 48 hours. A clear and effective service level agreement should be at the forefront of good customer service and the suggestion of a webpage dedicated to our customer service values, service level agreements and FAQs should be considered and clearly displayed on the Council's website.

It is therefore vital that Sandwell Council re-align enquiry response times to ensure that members and the public are receiving the information they need in a timely manner. In circumstances in which longer SLA times are needed, customers should be updated often as previously mentioned. The current SLA of 10 working days was deemed excessive as members often have multiple enquiries at any single given time. This makes it difficult to update residents as, understandably, frustration can arise when updates on their concerns are not provided.

As part of the review of the customer journey currently taking place, Cabinet should consider the reduction of response times.