

Appendix 1.

Customer Journey Action Plan May 2023:

CUSTOMER SERVICE STRATEGY								
	Workstream Task	Start Date	Previous Position	May 2023 Update	Responsible Officer	Expected Completion	Resources	
1	Face to Face Customer Journey mapping – including technology & performance metrics.	02/23	Initial mapping concluded. First formal Workshop held on 26 th April with positive feedback received. Session 2 scheduled for 12 th May. All future sessions, including feedback now scheduled	Housing solutions Complete Revs and Bens underway. Remaining services scheduled and Leads engaged. Sharing Event 10 th August	Maria Amos/CTO	07/23	Staffing - CTO	On Track
2	Commitments & Objectives to be agreed & approved.	10/22	Further comms issued to Members. Sessions arranged as above for face to face engagement	Engagement Sessions scheduled. + Dates extended to allow for additional promotion in the Herald for	Helen Green	08/23	Staffing – Comms & Customer Service staff to run F2F sessions. Small budget required for materials for sessions – costs tbc	On Track

				those digitally excluded				
3	Develop a comprehensive communications & engagement plan.	02/23	Dates confirmed and venues sourced. Promotional and marketing material being created. Invitations to be issued. Citizenspace to be utilised as appropriate.	CitizenSpace Survey completed – will be uploaded shortly. Session scheduled with Comms Team to agree completion of all activity to promote.	Elizabeth Beard	06/23	Staffing - Comms	On Track (date extended+)
4	Benchmarking exercise against other Local Authorities who have created Customer Experience Strategies to learn from recognised areas of best practice.	02/23	Benchmarking now complete	Complete	Clair Norton	05/23	Staffing – Business Manager	Complete
5	Develop a comprehensive training plan that will take in to account training needs in relation to customer service across the Council. To include F2F sessions for all staff as part of the Corporate Induction Programme. To link in to wider work in relation to	02/23	HG/TC continue to research available options for further discussion at CJ Board.	Research and benchmarking continue. Meeting arranged with market professionals to look at offers.	Helen Green/Debbie Sant	07/23	Staffing – Corporate Customer/L&D Budget required for training programme Discussions ongoing between HG/KA re available budget from LGA	On Track

	Culture/Values & Behaviour.							
6	Develop a co-produced strategy in collaboration with stakeholders and customers based on intelligence gathered. Formal approval & sign off via agreed governance channels, with an estimated launch date of September/October 2023.	03/23	Key dates now confirmed and F2F engagement sessions to commence in May.	Dates delayed to June to allow for promotion to those digitally excluded. Venues booked across the borough during day and evenings throughout June, July and August.	Helen Green/Corporate Customer Management Team	09/23 – 10/23	Staffing – Corporate Customer Management Team/Comms Cross Directorate support required	On Track
7	Address emerging risk highlighted by LGA re: Elected Member case work not being given the priority required – impacting the customer experience.	02/23	Discussions ongoing between TMcG/ST Local work ongoing to reduce historic open cases. Weekly report provided to Leadership Team to provide ongoing oversight.	Commenced attendance at members Board Meetings to allow engagement with all members. Action Plan and solutions to be drafted once all sessions complete.	Helen Green/Andrew Langford	On-going monitoring throughout 2023	Staffing – Democratic Services & Corporate Customer	On Track

ONE STOP SHOP/COMMUNITY HUBS								
	Workstream Task	Start Date	Previous Position	May 2023 Update	Responsible Officer	Expected Completion	Resources	
8	Ensure appropriate specialist Revs & Bens Officers are in place to meet customer demand and expectation.	10/22	Complete – monitoring no longer required	Complete	Theresa Shrigley	12/22	Staffing – Revs & Bens	Complete
9	Specialist Housing Officers from the Homeless Team to provide duty function within the OSS.	10/22	Still awaiting appointment booking system.	Still awaiting appointment booking system.	Karl Robinson	05/23	Staffing – Homeless Team	Minor Slippage
10	Community Hub Pilot to be trialled – 1 day a week in Blackheath Library & 1 day a week in West Bromwich Library.	02/23	Pilot continuing to operate and data gathered on satisfaction with service and reasons for utilisation of Hub to inform future options. Further comms required	New data collection in use and continuing to show positive results. Further comms agreed and produced. Mid point report currently in process for Leadership Team on 27 th June	Tracy Causer/Rachel Allchurch	09/23	Staffing – Corporate Customer/Housing Hub/Profile Security. Small budget of approximately £5k required for furniture removal & marketing.	On Track

CONTACT CENTRE								
	Workstream Task	Start Date	Previous Position	May 2023 Update	Responsible Officer	Expected Completion	Resources	
11	Undertake initial review of current Contact Centre models.	11/22	Leadership Team discussion held on 18 th April and agreement to pause review whilst supporting work continues to better inform future decision.	Complete	Helen Green/Tracy Causer	08/23	Corporate Customer	On Track
12	Inclusion of the chosen Option into the project business case so next steps can be agreed and progressed.	03/23	Agreement to pause Options Appraisal to allow a more informed decision at a later date	On Hold	Tracy Causer	08/23	Staffing – Corporate Customer/ASC/Revs & Bens/HR	On track/on hold
13	Replacement of current AVAYA CC6 contact centre telephony system.	05/22	Procurement timeline in place. Specification & Tender documents will be uploaded on the 10 th May 2023.	Tender published on InTend. Closing date 21 st June 2023. Evaluation to commence 26 th June.	Helen Green	06/24	Staffing – Corporate Customer/ASC/Revs & Bens/Housing Hub & other smaller teams using CC6 licenses.	On Track
14	Review current customer data – look at quantitative & qualitative methods. Ensure end	02/23	Revised data capture commenced on 1 st April and	New data capture in use	Theresa Smith/Tracy Causer	On-going whilst the CJ work is developing.	Staffing – Corporate Customer – front & back office staff.	On Track

	to end capture so data can be reliably used to inform decisions & direction of travel.		continue to be monitored.					
15	Investigate the feasibility and cost of providing an 0800 (or free) customer number `golden` number to the public (Request from Elected Member Briefing held in March 2023)	04/23	Potential requirement included in Specification for new telephony system. Further discussion around evidence gathering took place at CJ Board in April, with officers tasked to look into detail on costs and feasibility.	Included in engagement session questions and will be explored within Telephony procurement.	Helen Green/Tracey Causer/Clair Norton	06/23	Potential to include in previously agreed budget of £2.8m to be sourced from Capital, HRA & CJ Priority Service Investment Budget for new telephony system. Further costs to be identified as part of the scope of work.	On Track
TECHNOLOGY								
	Workstream Task	Start Date	Previous Position	May 2023 Update	Responsible Officer	Expected Completion	Resources	
16	Purchase SMART assistant to sit on front page of website and navigate to other pages of the new website.	01/23	SMART assistant purchased.	Complete	Clair Norton	02/23	£15k funded via CC vacancies.	Complete
17	Work between SMBC & Inform 360 to integrate Navigation Bot.	03/23	Continues to link to Website development	Continues to link to	Elizabeth Beard/Andrew Langford	Ongoing	Staffing – Corporate Customer	On Track

				Website development				
18	Procurement of new Complaints/FOI/SAR & MP system.	08/22	Business Case complete and scheduled for CAMB May 23. Procurement to follow if approved (full timescale will be provided in next report if approval granted)	Approval by CAMB in May. SIU approval in process. Specification being drafted.	Colette Knight/Dawn Webster	TBC	Staffing – Corporate Customer/Service Improvement/Legal Services. Costs of system tbc.	On Track
19	Review of all systems that support the delivery of customer service.	02/23	Arrangements for demonstrations and soft market testing underway. Scheduled for key Agenda Item at CJ Programme Board in May 23 with AL in attendance. Specific milestones to support this work drafted.	Discussion at Board in May. Potential for SOCITM to assist with this work. Awaiting decision from Director and CEX	Andrew Langford	07/23 for initial options appraisal	Staffing – Cross Directorate support required. Budget will be required if decision is to purchase new CRM system.	Minor slippage due to potential to include SOCITM
20	Increase data capture on customer satisfaction from end to end to inform improvements.	02/23	CH Pilot Satisfaction Survey working well. Issues	Work continuing to resolve ICT Issues.	Andrew Langford/Clair Norton	11/23		On Track

			observed with OSS Pilot due to Tablet protocols. ICT working to resolve.	Microsoft forms being utilised as `work arounds`. Data now included in this report.				
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Scrutiny Recommendations

Recommendation	May 2023 Update	Responsible Officer	Expected Completion	Links to Action Plan
1.1 That the Director of Regeneration and Growth/Assistant Chief Executive, in consultation with the Cabinet Member for Finance and Resources, be authorised to agree customer care standards/charter, and staff responsibilities in relation to those standards to ensure;	NEW	HG	Aug 23	3
a) that “back-office” staff take ownership and accountability of customer requests received via Contact Centre Agents;	NEW	HG	Aug 23	3
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;	NEW	HG	Aug 23	3
c) a standard approach to the complaints process and deadlines for responding to complaints are clear and accessible across all Council services;	NEW	All ADs and SMs	Aug 23	8
d) that key contacts are identified within each service area to aid Customer Service Agents in their enquiries;	NEW	All ADs and SMs	Aug 23	

	e) that residents are regularly updated and informed about the current process of their request/query.	NEW	All ADs and SMs	Aug 23	Link to Technology Workstream and 3	
	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:	NEW	Helen Green/Debbie Sant	07/23	6	
	a) The completeness of response letters	NEW	Helen Green/Debbie Sant	07/23	6	
	b) Methods to manage customer expectations and awareness around the Council's remit and responsibilities.	NEW	Helen Green/Debbie Sant	07/23	6	
	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.	NEW	Helen Green/Debbie Sant	07/23	6	
	1.4: That mandatory corporate customer service training be included as part of the induction process for all staff.	NEW	Helen Green/Debbie Sant	07/23	6	
	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.	NEW	Andrew Langford	07/23 for initial options appraisal	20	

	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.	NEW	Helen Green/Andrew Langford	April 24	14 15 20 21	
	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.	NEW	HG	Aug 23	3	
	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.	NEW	Helen Green/Tracy Causer	08/23	12 13	
	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.	NEW	Helen Green/Andrew Langford	Ongoing	17 18	

	<p>1.10: That the Director of Regeneration and Growth/Assistant Chief Executive reviews current timescales for responding to enquiries, with a view to reducing them wherever possible, including member enquiries being reduced from 10 working days to 3-5 days. (This is part of a wider piece of work on-going with Members around the Cllr Portal – the response time standard will need to be considered further and in line with this work)</p>	<p>NEW</p>	<p>Helen Green/Andrew Langford</p>	<p>On-going monitoring throughout 2023</p>	<p>8</p>	
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