

**Appendix 2.**

**Customer Journey Action Plan June 2023:**

CUSTOMER SERVICE STRATEGY								
	Workstream Task	Start Date	Previous Position	June 2023 Update	Responsible Officer	Expected Completion	Resources	
1	Face to Face Customer Journey mapping – including technology & performance metrics.	02/23	Housing solutions Complete Revs and Bens underway. Remaining services scheduled and Leads engaged. Sharing Event 10 <sup>th</sup> August.	Revs & Bens complete, Borough Economy & ASC underway.	Maria Amos/CTO	07/23	Staffing - CTO	On Track
2	Commitments & Objectives to be agreed & approved.	10/22	Engagement Sessions scheduled.  + Dates extended to allow for additional promotion in the Herald for those digitally excluded..	Engagement sessions commenced.	Helen Green	08/23	Staffing – Comms & Customer Service staff to run F2F sessions. Small budget required for materials for sessions – costs tbc	On Track

3	Develop a comprehensive communications & engagement plan.	02/23	CitizenSpace Survey completed – will be uploaded shortly. Session scheduled with Comms Team to agree completion of all activity to promote.	Comprehensive plan in place, but delays have occurred due to not being able 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	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	Research and benchmarking continue. Meeting arranged with market professionals to look at offers.	Meetings taking place July 2023, discussion will then take place at CJ Programme Board to agree way forward.	Helen Green/Tracy Causer/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	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.	First 4 sessions held, but attendance has been poor – further dates will need to be scheduled.	Helen Green/Corporate Customer Management Team	09/23 – 10/23	Staffing – Corporate Customer Management Team/Comms Cross Directorate support required	Minor Slippage
7	Address emerging risk highlighted by LGA re: Elected Member case work not being given the priority required – impacting the customer experience.	02/23	Commenced attendance at members Board Meetings to allow engagement with all members. Action Plan and solutions to be drafted once all sessions complete.	All Board meetings attended with a total of 54 Members in attendance. Presentation to be given to Cabinet Member, Chair & Vice Chair Meeting on the 10/7/23 – highlighting issues raised and next steps. Then further feedback will be provided at	Helen Green/Andrew Langford	On-going monitoring throughout 2023	Staffing – Democratic Services & Corporate Customer	On Track

				Members Board Meetings.				
<b>ONE STOP SHOP/COMMUNITY HUBS</b>								
	<b>Workstream Task</b>	<b>Start Date</b>	<b>Previous Position</b>	<b>May 2023 Update</b>	<b>Responsible Officer</b>	<b>Expected Completion</b>	<b>Resources</b>	
8	Ensure appropriate specialist Revs & Bens Officers are in place to meet customer demand and expectation.	10/22	Complete	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.	Duty function being provided, DT working with Housing to produce an apt 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	New data collection in use and continuing to show positive results. Further comms agreed and produced. Mid point report currently in process for Leadership	Mid-way report presented to LT 27/6/23. Further discussion to be had with The Leader. Also other options to be explored.	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

			Team on 27 <sup>th</sup> June					
<b>CONTACT CENTRE</b>								
	<b>Workstream Task</b>	<b>Start Date</b>	<b>Previous Position</b>	<b>May 2023 Update</b>	<b>Responsible Officer</b>	<b>Expected Completion</b>	<b>Resources</b>	
11	Undertake initial review of current Contact Centre models.	11/22	Complete	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	On Hold	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	Tender published on InTend. Closing date 21 <sup>st</sup> June 2023. Evaluation to commence 26 <sup>th</sup> June.	Evaluations complete, moderation sessions planned for 17 & 19 July, with contract award scheduled for August 2023.	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 to end capture so data can be reliably used to inform decisions & direction of travel.	02/23	New data capture in use	Customer Satisfaction data being captured for Corporate CC, Revs & Bens CC, Community Hubs and MySandwell.	Theresa Smith/Tracy Causer	On-going whilst the CJ work is developing.	Staffing – Corporate Customer – front & back office staff.	On Track
15	Investigate the feasibility and cost of	04/23	Included in engagement	Email sent to provider to	Helen Green/Tracey	06/23	Potential to include in previously agreed	On Track

	providing an 0800 (or free) customer number `golden` number to the public (Request from Elected Member Briefing held in March 2023)		session questions and will be explored within Telephony procurement.	request ball park cost. Feedback from engagement sessions will help to inform direction of travel.	Causer/Clair Norton		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.	
<b>TECHNOLOGY</b>								
	<b>Workstream Task</b>	<b>Start Date</b>	<b>Previous Position</b>	<b>May 2023 Update</b>	<b>Responsible Officer</b>	<b>Expected Completion</b>	<b>Resources</b>	
16	Purchase SMART assistant to sit on front page of website and navigate to other pages of the new website.	01/23	Complete	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 Website development	Elizabeth Beard/Andrew Langford	Ongoing	Staffing – Corporate Customer	On Track
18	Procurement of new Complaints/FOI/SAR & MP system.	08/22	Approval by CAMB in May. SIU approval in process. Specification being drafted.	SIU in progress, awaiting decision as to whether SOCITM work on CRM system needs to happen prior to a decision	Colette Knight/Dawn Webster	TBC	Staffing – Corporate Customer/Service Improvement/Legal Services.  Costs of system tbc.	On Track

				being made on this.				
19	Review of all systems that support the delivery of customer service.	02/23	Discussion at Board in May. Potential for SOCITM to assist with this work. Awaiting decision from Director and CEX	SOCITM have been commissioned to assist with this work. Kickoff session arranged for 18/7/23.	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	Work continuing to resolve ICT Issues. Microsoft forms being utilised as `work arounds`. Data now included in this report.	Links to Action 14. Customer Satisfaction data being captured for Corporate CC, Revs & Bens CC, Community Hubs and MySandwell.	Andrew Langford/Clair Norton	11/23		On Track

### Scrutiny Recommendations

	Recommendation	June 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 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	

	<p>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.</p>	NEW	Helen Green/Tracy Causer	08/23	12 13	
	<p>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.</p>	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>	NEW	Helen Green/Andrew Langford	On-going monitoring throughout 2023	8	