

Governance Committee

20 September 2019

Appendix 3 Development of a customer contact baseline

1 Purpose and aim

1.1 We currently lack a single, comprehensive dataset of customer contacts across all channels, including customer contacts with outsourced and commissioned services. We have investigated the work that would be required to create a comprehensive view of our customer interactions on an ongoing basis, and this Appendix explains this work and the recommendations for the next steps.

1.2 As part of the Customer Experience (CX) project, we have been working to fill in the 'gap' between complaints and compliments, which are the type of contacts that we've traditionally reported on. We are achieving this by gaining customer feedback and this Appendix explains expanding our work to better understand customer contact and how this could drive channel shift to help our customers help themselves. Understanding the nature of enquiries could be a next stage where the baseline data highlights high volume areas which could be investigated in greater depth for the reasons behind the contact.

1.3 This data is important as we cannot know customer journeys without it and it is difficult to identify where development is needed. In order to do this we need to trust the data and be able to access it. Due to the distributed customer contact model of East Sussex County Council (ESCC), we first needed to locate and validate the data sources for customer contact. The Council uses many different technological systems to interact with its customers, and not all of them are able to provide the data we would like. This Appendix explains the contact channels and the reporting capabilities and reliabilities of each system, and what can be done to take this forward if it is of interest to the Customer Project Board and CMT.

1.4 The potential benefits of gathering the data would be to:

- Provide senior managers, CMT and Members with oversight of customer interactions across different channels, with trends in volumes.
- Enable us to target customer experience feedback measurement systems to areas of highest volumes.
- Identify opportunities for channel shift to reduce cost and improve efficiency, for example by replicating success in other areas of the Council, and measure its impact.
- Continuing to imbed the Customer Promise into the culture of ESCC and enabling us to monitor its implementation through the development of KPIs measurable from the baseline data (and its subsets).
- Provide evidence to ensure consistency across the Council and outsourced services in delivering excellent customer service or be able to identify areas where we can improve customer experience.
- Increase accountability to customers and residents of East Sussex by publishing customer satisfaction and performance data.

2 Scope of data

2.1 We carried out a work request with IT&D in order to have a Business Analyst (BA) assigned to the work. The BA carried out the work needed to confirm the reliability of the reporting, validate the data and any data cleansing. This work took place from February to June 2019.

2.2 For this exercise we focused on the following customer contact points, which also include outsourced and commissioned services:

- Customer facing telephone numbers: we are only able to report on total incoming external telephone calls received (not just those which are answered) due to the limits of the systems
- Customer facing email addresses: external incoming emails
- Online forms (webforms and e-forms): submissions of forms

For this exercise we excluded:

- Incoming letters, these are currently not counted
- Enquiries via social media. Customers do contact us with enquiries through social media as a communication channel. This is a channel that could be investigated if going forward with this work.

3 Availability and reliability of data

3.1 The table below summarises the contact channels, systems, and the reliability of the reporting available:

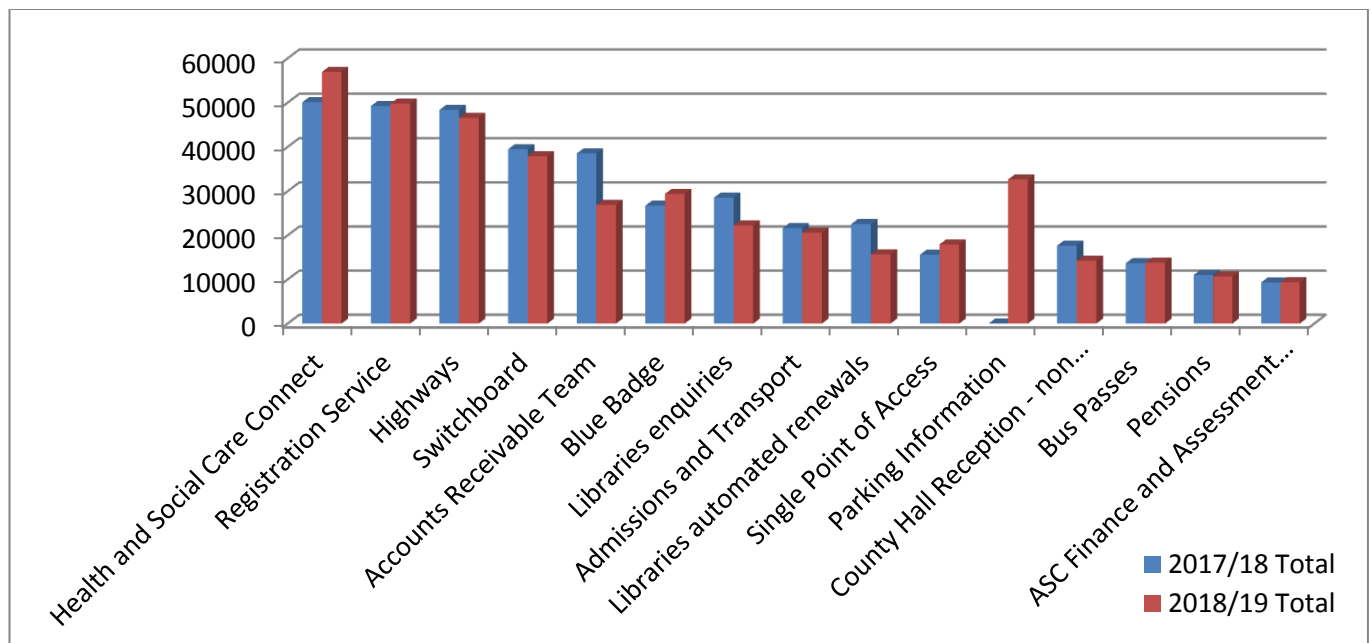
Contact channel	System, reporting reliability
<p>Customer facing telephone numbers</p> <ul style="list-style-type: none"> ▪ “non-geo” numbers, e.g. 0345s, 0300s. There are 12 numbers advertised on ESCC website ▪ Other numbers advertised on the website, e.g. 01273, 01323. There are approx. 100 telephone numbers listed on the website, these are individuals and team numbers. 	<ul style="list-style-type: none"> ▪ Systems: KCOM and Precision ▪ Reporting: Accurate ▪ Only incoming / received calls from external numbers. <i>Please note:</i> these figures <i>will</i> include staff calling from their ESCC mobiles into office landline telephone numbers.
<p>Customer facing email addresses</p> <ul style="list-style-type: none"> ▪ Email addresses listed (personal and group) on the website ▪ Approx. 100 email addresses are advertised on the website ▪ There are approx. 1,600 group email inboxes in ESCC, of which 400 – 450 are customer facing. This is discussed further in the sections below. 	<ul style="list-style-type: none"> ▪ System: Promodag ▪ Reporting: Accurate ▪ Only IT&D can access Promodag and staff have limited resources to provide the reports needed. However, once the report is configured and automated, very little staff time should be needed to receive monthly reports. ▪ Incoming external emails. Reporting cannot rule out auto-responses from external customers ▪ It has been confirmed that Promodag will be able to report when we move to Office 365
<p>Webforms</p> <ul style="list-style-type: none"> ▪ These are forms created in Umbraco or webforms which are embedded into webpages which are connected to information systems, e.g. a database a service uses to log enquiries ▪ There are approx. 90 – 110 webforms and e-forms combined on the website 	<ul style="list-style-type: none"> ▪ Systems: Umbraco and various information systems ▪ Reporting: Accurate ▪ However, access varies. Figures from Umbraco need to be worked through with Digital Services. Access to figures of webforms via information systems would entail contact with each service who manages their system.

	<ul style="list-style-type: none"> All received webforms
<p>e-forms</p> <ul style="list-style-type: none"> These are forms which act as an email. There are approx. 90 – 110 webforms and e-forms combined on the website 	<ul style="list-style-type: none"> System: custom development within the website Reporting: not possible. These forms are sent internally to email inboxes and they are counted as internal emails. However, we are working with Digital Services to find a workaround where we count the number of “thank you for your submission” webpages, which should give us figures of how many times e-forms has been used by customers.

4 Data results

4.1 Our aim was to gather monthly figures in order to reveal seasonal fluctuation. It wasn't possible to gather this data for the last three financial years as there was too much restructuring in services and systems to make it possible to report on 2016/17. Instead data from 2017/18 and 2018/19 were used. However, we needed to enter estimates for 'non-geo' telephone numbers for April, May and June in 2017 as the data were not available in KCOM.

4.2 **Customer facing telephone numbers:** We have been able to pull together figures for telephone calls. For all the telephone numbers advertised on the ESCC website, we received a total of 474,107 in 2018/19 and 469,004 in 2017/18. The number of received calls has increased from the previous year. The last year included the extending of Health and Social Care Connect's opening times, and for this telephone number, there were approx. 6,000 more calls from 2017/18 to 2018/19. The following are the top 15 numbers with the highest received telephone calls for the last two financial years.



4.3 **Customer facing email addresses:** We were unable to receive email data due to the limited resource availability of IT&D staff. Please see further steps in recommendations below.

4.4 **Online forms:** We were unable to receive these data. We will need to work with Digital Services to gain access.

5.0 Conclusion and recommendations

5.1 As is evident from the information gathered, there are a number of ways customers can contact us and there is a possibility of creating a customer contact baseline. Although it is initially challenging to draw out the data from the various systems, it is possible to create a basic baseline. It would be too resource heavy to propose bringing contact channels into one system or better systems for reporting. This exercise has proven there are enough data to pull together to establish an initial baseline.

5.2 In the process of this investigative work, we have identified the approximate number of customer facing telephone numbers, email addresses and online forms. This is important as the numbers are high across all of the contact channels and potentially confusing for customers. It would be beneficial to carry out an exercise in trying to reduce these numbers for customers and for staff, or at the very least delete unused and obsolete points of contact. This also means we can focus on the right places to make improvements for customers and on the effectiveness of how they contact us, making information clearer.

5.3 As part of this investigation we investigated obtaining dashboard software or platform in order to present the data to CMT. We could not identify software readily available in ESCC. We also investigated purchasing software but this was too expensive. Since our aim for this work is to start small, with the available data, and, if this development proves beneficial and meaningful, expand to where the need arises, we identified that MS Excel can be used to fit our needs for the beginning. The BA has arranged for us to create a dashboard in MS Excel once we have received all the data. We would also like to investigate how this can be presented onto the intranet or website if needed (without it appearing as a document to open).

5.4 The Corporate Content Strategy Group and Digital Services have also expressed a need for the data and to be presented meaningfully via a dashboard, along with other key data identified. This collaboration is still underway.

5.5 We believe there is still some way to go, and if the following recommendations are approved and carried out, the next steps would be to focus on exploring and delivering the benefits listed in section 1.4, for customers, staff, senior managers and CMT. It is recommended:

- **The Customer Project Board and CMT to approve gathering data on telephone calls, emails, and online forms.** CET Customer Services Team would carry out reporting on the available data. This recommendation involves requesting the email data reports in IT&D to be prioritised and setting up automated reports. In order to provide this information there may be a possibility to use the CX Project reserve funding to pay for the reporting to be set up for both the email addresses and the online forms.
- **Present a baseline of contact channels at the next Customer Project Board.**
- **Justify and reduce the number of points of contact where possible.** There is potential for some quick wins by making information simpler and clearer for the customer on the website. It could also benefit staff by having fewer contact points to manage. This work would include:
 - **Telephone numbers:** ensure all numbers are up to date and necessary
 - **Group email inboxes:** There are approx. 1,600 group email inboxes for the Council, with about approx. 400-450 public facing, and 300-350 non-public facing, and about 800-900 group email addresses potentially not current and no longer used. Approx. 100 emails of both group and individual email addresses are advertised on the website. Other group email addresses can easily be deleted, and it is suggested they are deleted if they haven't been used in the past year.
 - **Online forms:** ensure all forms are up to date.
- **Create routine monitoring of customer facing email inboxes:** Currently there is no oversight of the creation or deletion of them. It would be beneficial to consider this to be done as the approval

step of a new address or to create automated reports and monitor the usage with the deletion of unused accounts as the result. The Customer Services Team can create a two pronged approach – one from the frontend to ensure the contact details are the simplest, clearest information for the customers (and reduce where possible) and from the backend to ensure that deletion of unused accounts is monitored and carried out.

- **Investigation of benefits:** Once the baseline has been established, report to CMT in an annual report the progress on investigating the benefits listed in section 1.4. This would entail establishing baselines for the customer contact channels and prioritising high to low in order to identify the high volume customer contacts areas to focus on.

5.6 This development is not without its issues, but the exercise for establishing a baseline is important to progress. The data will need cleansing and rationalising in order to make it fit for the baseline. It would be beneficial to know how other councils report on these issues, which would also help if we wish to benchmark our data with comparator or neighbour authorities. The results can be presented to the Customer Project Board and to CMT to offer explanations about what meaningful data and analysis can be made.